POSTELIX

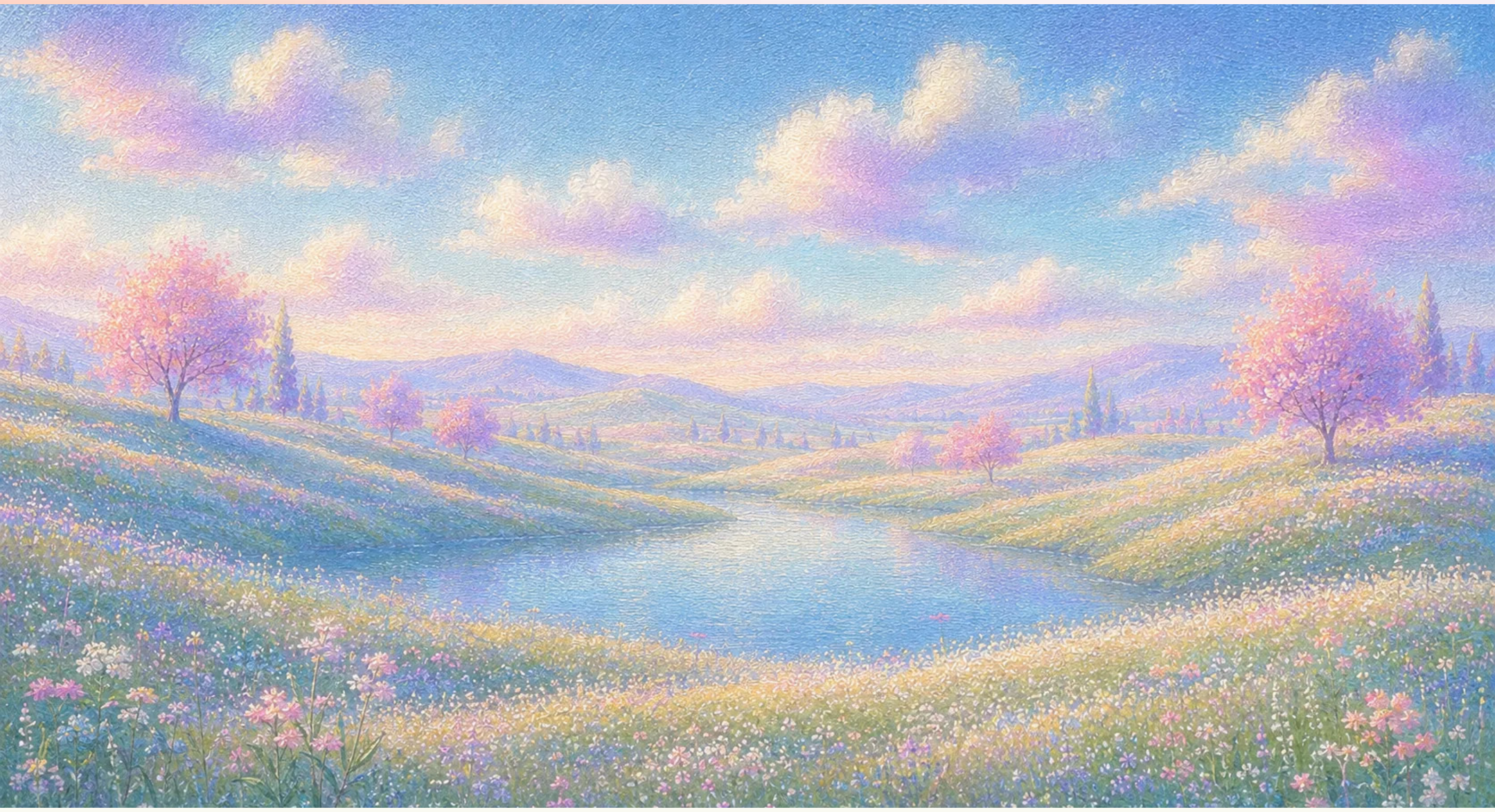
Public edition / 2026

POSTELIX PLAYBOOKS / 01

The named market playbook.

Turn buyer knowledge into better marketing.

Ads, outbound, events and influencers. Step by step.



MAKE YOURSELF AT HOME

Find your starting point.

Start with the workflow your team already needs. Each chapter gives you the clicks, the output and a way to judge its value.

GETTING STARTED

Start here: what you should be able to do after reading this

You are planning where the next marketing budget and sales effort should go. Start with the buyers you want to reach, then use the relevant workflow to prepare the work.

Now comes the useful question: what do you actually do on Monday?

This guide takes you from the data to work your team already needs to do. You will choose an ad audience, prioritise outbound accounts, assess an event or select an influencer partnership. Each workflow ends with an output you can use and a way to judge whether it helped.

The first return can be practical: removing irrelevant accounts before a campaign launches, cutting repeated sales research, or giving a marketer a defensible reason to choose one event or influencer over another. Revenue follows only when the resulting marketing and sales activity works. The guide shows you how to measure both.

The answer to “Why do we need another data tool?”

Use this explanation, then fill in the specific campaign your team is working on:

> We are using Postelix to improve how we allocate the marketing and sales effort we already have. It maintains a view of relevant buyers and their observable activity, so we can use the same buyer context to target ads, prioritise outbound, choose events and select influencer partnerships. Our first application is [specific campaign or decision]. The output is [a reviewed ad audience, outbound account priorities, an event decision or an influencer shortlist]. [Person] will use it by [date]. We will judge it against our current process using [quality, time, delivery and commercial measures]. We will expand its use when that first workflow earns its place.

That is the business case this guide helps you make concrete.

Choose your starting route

Start with the row that describes your current work. Read the setup and market-review sections, then follow that route. The other workflows remain available when you need them.

What your team is doing	Start with	First useful output	Who owns it
Running or preparing LinkedIn campaigns	3. Ads	A reviewed company audience and targeting for the right roles	Demand generation or paid-media owner
Choosing which accounts and people sales should approach	4. Outbound	Account priorities, relevant openings and clear ownership	Sales owner with marketing
Deciding where to attend, exhibit or sponsor	5. Events	An event comparison and a meeting plan based on available evidence	Event marketing or field marketing
Considering influencer partnerships or sponsorships	6. Influencers	A reasoned shortlist and a specific collaboration proposal	Marketing or partnerships
Needing to demonstrate value after the first month	10. Business case	A report connecting cost, decisions and outcomes	Marketing owner plus manager

The working times below are planning allowances for someone who knows the business. They exclude data collection, audience matching, colleague responses and campaign delivery.

The first ten working days

Day	Work	Evidence of progress
1	Pick one route, agree its owner, confirm the market definition and start setup	A written decision, baseline and configured market
2	Review the first useful audience sample and correct obvious mismatches	A buyer group the owner recognises
3	Prepare the selected workflow: ad audience, outbound priorities, event comparison or influencer shortlist	An artifact another person can act on
4-5	Put it into use when ready: launch the approved campaign, start relevant conversations or act on the event or influencer decision	An action outside the dashboard
6-7	Inspect delivery, public response and any operational problems	A short list of findings and fixes
8-9	Make the next adjustment and hand useful observations to sales	A documented decision and clear next actions
10	Review the first cycle with the manager	What changed, what helped, what is still unknown

If data coverage is insufficient, use the review time to repair the buyer definition or source mix. A ten-day schedule is a working plan; it cannot make a source produce evidence it does not contain.

Keep one decision sheet beside the app

A shared document is enough. Copy this:

Field	Your answer
Campaign or business decision	
Intended buyer group and region	
Current approach	
What would make us choose differently?	
Postelix output we will use	
Person responsible for using it	
Date of first action	
Baseline: time, quality, spend and current results	
Review date and success criteria	
What we changed and why	
Result and next decision	

Throughout this guide, **receipt** means the source observation behind a recommendation: for example, a public comment, a post or an available profile-view record. Read the source before relying on the recommendation.

CHAPTER / 01

1. Set up the market around the business you actually sell

Allow: 45-90 minutes of operator time, plus processing. **Owner:** someone who can recognise a good customer. **Finish with:** a clear market definition, relevant sources and the connections needed for your first workflow.

1.1 Gather the inputs

Have these ready:

- Your company name, website and LinkedIn company-page URL.
- Two or three companies your buyers genuinely compare you with.
- The regions you sell into.
- The roles involved in recent purchases.
- A few examples of good customers, unsuitable companies and current opportunities.
- The person who will own the first advertising, outbound, event or influencer decision.

The customer and exclusion examples are reference material for your review. Use your existing CRM or approved company records; you do not need to give everyone in the workspace access to an entire customer database.

For a company with several products, start with the product and buyer group relevant to the first workflow. Combining unrelated markets makes account selection and channel comparisons harder to interpret.

1.2 Open Setup and confirm company identity

For a new workspace:

01 Open the Postelix start page and follow the work-email sign-in flow.
02 Open **Setup**. The setup stages cover **Company**, **Market**, **Plan**, **Build** and **Connect**.
03 Enter **Company name** and **Company website**.
04 Enter the real LinkedIn company-page URL. Use the provided no-page option if you do not have one.
05 Add the competitor company-page URLs requested on the form.
06 Select **Research my market**.
07 Review the resulting company and buyer proposal before continuing.

For an existing workspace, review the current setup before starting another market. Check that the setup still describes the offer and buyer group you intend to work with.

1.3 Describe your offer and intended buyers

A useful sentence describes a customer, a problem and a product.

Too broad:

> We help ambitious businesses transform the future of work.

Useful:

> We sell contract-management software to finance and legal teams at mid-sized European businesses that need control over renewals, obligations and contract spend.

Use the words customers use. A clever tagline is rarely a sufficient description of what the product does.

Then review:

01 **Titles:** include the buying roles you have actually encountered.
02 **Industries:** reflect the companies you can serve.
03 **Regions:** use explicit countries or regions your team can operate in.
04 **Company size:** describe the practical customer range.
05 **Competitors and market topics:** retain relevant sources and remove weak suggestions.

A finance user, a legal evaluator and an executive approver may all belong in the market. They should still receive different messages.

1.4 Review the market inputs

Review the competitors, topics and optional inputs proposed during setup. Keep the ones that are relevant to the buyer group you defined.

01 Open the available company or LinkedIn references.
02 Check that the proposal represents the product, region and buying roles you intend to serve.
03 Use **Not relevant** for an obvious mismatch.
04 Confirm relevant suggestions with **Add to market**, where available.
05 Record important gaps for the setup review.

A large result is not automatically a useful result. Judge the resulting people and companies against the campaign, and use the audience-review workflow before taking action.

1.5 Confirm the plan and start the build

01 Review **Choose the boundary for this market**.
02 Check the people, user and connection allowances shown for your selected plan.
03 Review the price, trial and renewal terms in the checkout.
04 Select the available build or trial action and complete the checkout if required.
05 Return to **Build** and check progress.

Use the terms shown in your checkout or agreed order. This guide does not change your subscription, promise a particular number of discovered buyers or include advertising spend.

The audience will populate as data arrives. An early result can be useful without every section being complete. An error or stalled source should be investigated; repeatedly starting the same work does not improve the underlying evidence.

1.6 Connect the account needed for your workflow

In **Connect**, select **Connect LinkedIn**, complete the hosted flow and any identity confirmation.

Review the available controls:

Control	When you need it
Capture	Bringing available engagement from the connected identity into the workspace
Outreach	Preparing and sending approved messages through the connected sender

You can research audiences, events and influencers without turning every connection on. Enable the capabilities you intend to use.

Capture-only teammate connections and an outreach-enabled sender have different purposes. A teammate connected only for capture is not the account your salesperson should use to send messages.

Profile-view coverage depends on what LinkedIn makes available to the connected account. Anonymous viewers remain anonymous. Follow the connection-status explanations in your workspace rather than assuming every account supplies the same data.

1.7 Add a teammate when their activity matters

Use **Settings** → **Team capture**, or the equivalent panel during setup.

01 Read **Confirm company authority**.
02 Enter the requested employee jurisdictions and confirm the statement if appropriate.
03 Select **Record company authority**.
04 Enter **Teammate name** and **Work email**.
05 Select **Send private link**.
06 The teammate reviews the disclosure and completes their own consent and connection steps.
07 Check the resulting connection status.

Start with a founder or customer-facing colleague whose public activity is relevant to your market. Invite more people when their contribution serves the workflow.

If the status requires reconnection, ask that person to complete it. The owner should not enter someone else's credentials or accept for them. Follow your organisation's normal requirements for employee data and account connections.

You are ready to move on when: the offer and buyer definition are recognisable, the relevant sources are collecting, and someone is responsible for reviewing the results.

CHAPTER / 02

2. Review the audience once so every downstream decision improves

Allow: 30-60 minutes for the initial review. **Owner:** marketing, with sales input for ambiguous companies. **Finish with:** a working buyer group, documented exclusions and an understood coverage gap.

2.1 Open people and inspect the evidence

01 Select **Audience**.
02 Choose the **People** view.
03 Set **Good fit** to **Strong fit**.
04 Open ten people across different companies.
05 Read **Why they fit**, the current role, the company description and the source activity.
06 Use the company and LinkedIn links to resolve important uncertainty.
07 Record which are relevant, wrong or still unknown.

Ten is a practical first inspection, not a statistical certification. A high score is a starting point for review.

Look for three distinct things:

- **Company fit:** could this business sensibly buy?
- **Role fit:** does this person use, influence or approve the purchase?
- **Current relevance:** is there an observation that helps with the campaign decision?

Someone can fit the market without being ready for a sales message. This matters particularly for campaigns intended to build awareness.

2.2 Remove obvious errors without narrowing the market to the loudest people

01 Change **Good fit** to **Low fit** and review obvious mismatches.
02 Under **More filters**, inspect **Buying role** and **How found** where useful.
03 Remove people who are clearly outside the market.
04 Return to the strong-fit view and check that valid but quieter buyers remain.
05 Review **Relationship** and **Sales stage** to distinguish new prospects, active conversations and customers.

Do not remove a valid buying role solely because the person has not commented recently. Public activity is uneven; a quiet finance director can still be a relevant campaign audience member.

For a new-client campaign, reconcile customers and active opportunities with the CRM or your agreed exclusion record. A missing relationship label is not proof that no relationship exists.

2.3 Correct a repeated mismatch

If several people look wrong for the same reason, check the market definition in **Setup** → **Market**.

01 Compare the mismatches with your intended company type, buyer roles and region.

02 Correct a clearly inaccurate description or boundary.

03 Record a short explanation, such as "Recruitment firms were included; our customer group is software vendors."

04 Ask the workspace owner or Postelix setup contact to investigate if the definition is right but the results remain unsuitable.

05 Review a fresh sample before using it in a campaign.

Removing individual people can clean the current view. Documenting the repeated problem helps the next review and keeps colleagues consistent.

2.4 Switch to Accounts

01 In **Audience**, choose **Accounts**.

02 Open companies you recognise and a few that are new to you.

03 Inspect the people attached to each account.

04 Read any first-door or potential-champion recommendation with its evidence.

05 Check whether current employment is supported.

06 Compare the recommended contact with what you know about the buying process.

A first door is someone who may help you enter the account. A champion is someone who supports the purchase inside it. Use the stronger label only when the relationship supports it.

When two colleagues engage with related content, investigate whether a shared project exists. Their engagement alone does not confirm a buying group.

2.5 Mark the campaign cohort deliberately

For a campaign that serves only part of the market:

01 Open the relevant people.

02 Use the **Ad audience** control to mark the intended cohort.

03 Review existing marks before exporting; previous selections may still be present.

04 Keep a note of the buyer roles, region and product represented by this cohort.

05 Recheck exclusions before the export.

The ads workflow can use **Whole audience** or **Marked for ads**. Choose the one that matches the campaign brief.

A person-based selection later collapsed to companies identifies accounts. You will define eligible roles within those companies in Campaign Manager.

2.6 Record your starting point

Copy this small table into the decision sheet:

Check	Initial finding	Correction
Strong-fit people inspected		
Clearly relevant people		
Wrong or uncertain companies		
Customer/opportunity exclusions checked		
Missing buyer roles or regions		
Source issue to resolve		
Date and reviewer		

Worked example - illustrative: you inspect 20 people for a finance campaign. Four work at agencies you do not sell to, three are existing customers and two are uncertain. You remove or exclude the seven known mismatches and research the two uncertain records before export.

The immediate value is a better input to the campaign. You have not yet proved an amount of advertising money saved; that requires delivery or a valid comparison.

> **You are ready to move on when:** the campaign owner can explain who belongs, who is excluded and what the remaining uncertainty is.

CHAPTER / 03

3. Ads: put the next campaign in front of a reviewed buyer group

Use this when: you already run LinkedIn ads or have a funded campaign ready to prepare. **Allow:** 60-90 minutes of setup, plus matching and approval time. **Finish with:** a reviewed account audience, role filters, an approved creative and a measurement record.

3.1 Define the campaign before opening Campaign Manager

Complete these five lines:

> We are promoting [offer or message]. It is intended for [buying roles] at [types of company] in [region]. The next action we want is [read, visit, register, enquire or another specific action]. We will initially test [audience OR creative change]. The owner is [name], with a budget of [amount] and review date [date].

Select the objective to match the intended action. An engagement campaign and a lead-generation campaign answer different questions.

If you already have a campaign that works, record its settings and baseline before changing it. Postelix does not require you to replace your entire advertising setup.

3.2 Prepare the account file in Postelix

01 Open **Ads**, titled **LinkedIn ad audiences**.
02 Under **Choose who goes into the file**, select **Whole audience** or **Marked for ads**.
03 Use the company-level option, **Reach buyers at these accounts**.
04 Select **Prepare company file**.
05 Read the readiness result and coverage tiles.
06 Check the company identity coverage: LinkedIn Page URL, website/domain and name-only records.
07 Review duplicate collapse and missing company identity.
08 Select **Download company CSV**.
09 Save the file with a date and campaign name.

Example filename: finance-renewals-dach-2026-09-07.csv.

A file being upload-ready means its source and structure passed the relevant checks. LinkedIn still determines matching and delivery.

Keep the prepared export reference with your campaign record. When you refresh later, you want to know which version was actually used.

3.3 Prepare the people-within-accounts targeting

On the same page, find **Choose the accounts, then define who inside them**.

01 Enter or confirm **Locations: required**.
02 Review **Exact job titles**.
03 Review **Job functions: review** and **Seniorities**.
04 Inspect **Explicit title exclusions** where available.
05 Read the precise and broader setup options.
06 Select **Copy setup** or **Download setup (.txt)**.
07 Give the CSV and setup notes to the same campaign owner.

Illustrative example: the account file contains appropriate mid-market businesses. The campaign is about reducing renewal surprises. Finance directors and relevant finance operations roles belong in the targeting. A company's junior design staff do not become intended buyers simply because their employer appears in the file.

Exact titles can be appropriate when the roles are well defined and the available audience is sufficient. Function and seniority can provide another useful targeting route. Inspect the resulting audience rather than applying either method as a universal rule.

3.4 Upload the audience to LinkedIn

In **LinkedIn Campaign Manager**:

01 Select the correct ad account.
02 Open **Plan** → **Audiences**.
03 Select **Create audience** → **Matched Audience**.
04 Choose **Company / Contact**, then **Next**.
05 Enter a descriptive name with the date.
06 Set **List type** to **Company list**.
07 Choose **Select list** and upload the Postelix CSV.
08 Review the required terms and select **Agree & Upload**.
09 Return to Audiences to monitor its status.

Use LinkedIn's current template if the interface reports a format problem. Preserve its headers and the company identities. Official upload instructions

The company-list upload requires at least 300 rows; an active ad set also requires at least 300 matched member accounts. LinkedIn recommends larger company lists for matching, and matching can take up to 48 hours or occasionally longer. Check the result after your location and role filters. Company-list requirements

If the legitimate market is too small, choose another route in this guide. Do not add unsuitable companies just to reach a technical minimum.

3.5 Apply the audience to an ad set

Create a new ad set for the test or carefully edit the intended existing one.

01 Select the objective and format that match the campaign brief.
02 Include the matched company audience.
03 Apply the required location.
04 Apply the intended title or function/seniority approach.
05 Add relevant exclusions, including customers or current opportunities when appropriate.
06 Review whether any audience-expansion setting would broaden the intended test.
07 Choose placements deliberately. For a LinkedIn-feed-only test, turn off Audience Network where the option is available.
08 Set the agreed budget, schedule and bidding option.
09 Review the final available audience and estimated delivery.
10 Save the setup and ask the campaign owner to check it before launch.

Do not launch both precise and broad variants simply because the app printed both. Choose an initial approach, then create a deliberate comparison if the budget and audience support it.

What this changes: company selection is grounded in your reviewed market, while LinkedIn still selects eligible members within the targeting constraints. You are improving targeting inputs; you are not buying guaranteed delivery to a private list of named individuals.

3.6 Sponsor a founder post as a Thought Leader Ad, if that fits the campaign

Choose a post with a relevant idea and a clear connection to the campaign. Useful organic engagement is one input; a low-reach post can still express the right message for a paid audience.

Check that you have suitable Page and ad-account access and that the author is willing to approve sponsorship. The supported objective depends on the format; consult the current options rather than assuming every objective is available. Thought Leader Ad eligibility

To request sponsorship:

01 Open **Ads in this ad set**.
02 Select **Browse existing content**.
03 Choose **LinkedIn members**.
04 Open **Posts** and search for the author or post URL.
05 Select the intended post.
06 Choose **Request approval**, then **Send**.
07 Wait for the author's approval and verify the resulting status.
08 Preview the ad before launching.

Use Creator Marketplace where required for discovering and requesting sponsorship from third-degree-plus connections. Creation instructions

Original-post links can remain in a sponsored post. Make the choice based on the intended action. You do not need to remove a useful link under the mistaken belief that all linked posts are ineligible.

Start with approval for the specific post. A broader auto-approval arrangement should reflect a deliberate agreement with the author.

3.7 Register the measurement context in Postelix

Open **Company attention**, titled **Your company universe**.

The page can collect available public engagement without a manual campaign entry. Add an entry when you want to associate a specific external campaign, link or spend with the reporting.

01 Expand **Manual measurement · optional**.
02 Select **Add manual measurement**.
03 Enter **Measurement name** and **Channel**.
04 Choose the exact **Published post** if available.
05 Select an **Audience bucket** when relevant.
06 Add the external creative reference.
07 Add the landing-page URL and the campaign's UTM values where applicable.
08 Enter dates and manual spend.
09 Save the measurement.
10 Check the linked post and copied tagged URL before using them.

If the correct post is missing, verify its publication and capture status. Do not attach a vaguely similar post just to finish the form.

Tagged site sessions and company resolution depend on the workspace's available attribution features. Follow the availability message shown. Postelix's measurement entry does not launch the ad or change LinkedIn targeting.

3.8 Review the first delivery

First inspect Campaign Manager for delivery, spend, frequency and the relevant outcome metric. Then inspect Postelix for observed engagement from the intended market.

Ask:

- Is the ad delivering to the intended geography and professional audience?
- Are the available audience and delivery sufficient for a useful test?
- Which relevant people or companies publicly responded?
- What do their actual comments or actions suggest?
- Did conversations, enquiries or qualified opportunities follow?
- Were there operational errors that make the result hard to interpret?

A public reaction on a sponsored post can come from organic distribution. Report it as engagement on that post unless your source supports a paid-specific attribution.

Manager update:

> We reviewed the target companies and applied the intended buying roles. The campaign is now using audience version [date]. At [spend], we have [delivery result], [observed buyer response] and [commercial result]. Our next change is [action], because [evidence].

> **You have completed this workflow when:** the reviewed audience is in use, its targeting is documented, and the first review connects actual delivery with buyer and commercial response.

CHAPTER / 04

4. Outbound: focus sales effort on the right accounts and people

Use this when: you are choosing accounts for the next sales cycle or deciding which observed activity deserves a conversation. **Allow:** 15-20 minutes per working day for a small reviewed queue. **Finish with:** reviewed account priorities, relevant first actions, clear ownership and recorded outcomes.

4.1 Choose the accounts worth the team's time

Start with the commercial priority: a buyer group, region, product or sales campaign. Agree who owns the outreach and what makes an account worth pursuing now. A buying signal can improve the timing, but an account can be relevant without having interacted with your brand.

01 Open **Audience** and choose **Accounts**.

02 Inspect companies against the agreed buyer group and current sales priority.

03 Review the named people at each company, including the suggested first contact where available.

04 Open the person and check their role, company fit and source evidence. A senior title alone does not make someone the right first conversation.

05 Check for customers, existing opportunities, active conversations and exclusions in the CRM or agreed relationship record.

06 Choose a small set the team can research and contact properly. Record why each account belongs, who owns it and the next action.

Separate fit from timing. A public question about a relevant problem may justify a specific opening. A match to the buyer definition supports prospecting, but does not establish that someone is shopping, has budget or needs to act this week.

The output is a set of commercial choices: which accounts deserve effort, which person to approach and what makes the conversation relevant. The maintained audience helps the team revisit those choices as people, companies and evidence change.

4.2 Review the suggested work

01 Open **Home** and inspect **Do now**, or open **Leads** → **Today**.

02 Read the reason for each suggested action.

03 Open the person and their account.

04 Check the source, date, role and company.

05 Check for an existing customer relationship or active conversation.

06 Decide whether to act, research, snooze or mark it irrelevant.

"Recently discovered" can include a person found through old activity. Read the activity date and the evidence basis. Discovery time and action time may differ.

Do not send a message merely because a person appears near the top of a queue.

4.3 Choose the appropriate action

Observation	Useful next step
Person asks a relevant question in public	Answer the question or offer a genuinely relevant resource
Relevant buyer comments thoughtfully on your post	Continue the discussion; explore the issue if appropriate
Several relevant people at an account engage	Inspect whether a shared initiative exists before suggesting one
A person only reacts to broad industry news	Keep as context; avoid inventing urgency
Available profile-view record	Review fit and other context; avoid a message announcing surveillance
Existing opportunity resurfaces	Give the existing owner the context
Wrong role or unsuitable company	Correct the record and stop the outreach path

Marketing and sales should agree what is worth acting on. That agreement prevents a stream of low-value notifications from becoming another task nobody trusts.

4.4 Prepare the first message

01 On the relevant card, select **Prepare outreach**.
02 Open the resulting draft in **Leads** → **Drafts**.
03 Read the evidence beside it.
04 Correct any weak inference or unsupported claim.
05 Use **Save edit** where needed.
06 Confirm that the intended sender is the connected account.
07 Select **Approve and send** when the message is appropriate.

A message can refer naturally to a public idea without reciting the research process.

Public discussion example:

> The ownership point you raised is the one we keep seeing too. When renewals move between finance and legal, who owns the final decision on your side?

Direct commercial example:

> We help finance teams investigate that handoff before it turns into a renewal surprise. Happy to send the checklist we use if it would help.

Use these shapes only when they truthfully describe your business and the context. The best length is the shortest message that communicates the relevant point clearly; this guide does not impose a character count as a law of sales.

4.5 Continue the conversation

Open **Leads** → **Inbox**.

01 Read the reply and the thread before answering.
02 Answer the person's actual question.
03 Send promised material when it is ready.
04 Ask one useful follow-up if the problem remains unclear.
05 Suggest a call when there is a real reason to discuss it.
06 Record an explicit next step and date.

If the person asks for a readout, provide the requested readout or explain honestly what has not been prepared. A generic guide is not a personalised analysis.

If they say the timing is wrong, agree a suitable date. If they decline, record it and stop. Follow any account restrictions and your organisation's outreach requirements; a pacing rule is not a guarantee of account safety.

4.6 Prepare the meeting from the account

Before the call:

01 Open **Audience** → **Accounts**.
02 Open the company.
03 Review the recommended first contact and other known people.
04 Read the source evidence behind relevant activity.
05 Check current employment and any existing relationship.
06 Write three questions about the business decision.
07 Open the actual source links you may need during the discussion.

Lead with what the prospect is trying to do. The research should improve your questions.

An account's technology mention in a job advertisement is a clue to verify. Do not turn it into a certain installed-system claim, or infer budget and pain from it.

4.7 Record the outcome so the next person has context

Use the person's **What happened** controls and relevant sales stage to record the real outcome: contacted, referred onward, replied positively, meeting booked, wrong person, no longer at the company or a confirmed champion.

Record customers and active opportunities in the agreed system of record, then reconcile the audience. Avoid duplicate outreach across colleagues.

If email is the appropriate route, use **Get email** on the person card. Confirm the result and the permission to use it under your process before handing it to the email operator. A verified address improves deliverability evidence; it does not establish consent or purchase intent.

Manager update:

> We prioritised [accounts or buyer group] because [fit and timing evidence]. We approached [number] relevant people and recorded [qualified conversations or outcomes]. The useful difference was [better account selection, less preparation time or a discovered opportunity]. Our next adjustment is [action].

You have completed this workflow when: the team has acted on useful evidence, avoided duplicate work and recorded what happened.

CHAPTER / 05

5. Events: choose the right room and arrive with a plan

Use this when: you are deciding where to attend, exhibit or sponsor, or preparing meetings around an event already in the calendar. **Allow:** 45-60 minutes for an initial comparison, plus source checks and conversations. **Finish with:** a reasoned event decision, a reviewed set of people or accounts to approach, and a plan for measuring what the event produces.

The useful question is which event gives your team a credible opportunity to meet the buyers you want, at a cost you can justify. A large attendance number is only one part of that decision. Postelix connects the event research to your named market so you can examine the people, companies and evidence behind the recommendation.

5.1 Define the decision before reviewing the events

Record the buyer group, region and commercial objective in the decision sheet. Be specific about the decision you need to make:

- Attend with one person or send a larger team.
- Buy a stand, sponsor a session or attend without a sponsorship.
- Prioritise one event over another.
- Prepare meetings around an event you are already attending.

Keep a baseline: last year's actual cost and outcomes, the alternative event, or the current plan. Include tickets, sponsorship, travel, preparation, staffing and follow-up time. A stand and a delegate ticket are different investments, even when they put you in the same venue.

5.2 Inspect the event map in Postelix

01 Open **Events**.
02 Read **Research status** and the last completed date.
03 If a new pass is needed and the control is available, select **Research events now**. Wait for the research status to finish before treating it as refreshed evidence.
04 Read the event's dates, city and **Why it fits this market**.
05 Select **Open event site** to check the current edition, programme and practical details.
06 Use **Not relevant** for events that clearly do not fit this buyer group.

A sourced event can appear before any person or company from your market has matched it. At that stage, it is a research candidate. Do not present the card as evidence that your buyers will attend.

An organizer request or an attachment awaiting review is also not an available attendee list. Use the evidence currently shown; ask your Postelix contact about missing coverage when it affects the decision.

5.3 Read what each match actually establishes

On the event card, review **People from your market**. Expand **Show more people** where available, then open **Why this person is here** to read the underlying receipts.

Evidence shown	What it supports	What to check next
Organizer list	The organizer recorded this person on the supplied list	Edition, date, role and whether the record is still current
Self-reported attendance	The person publicly said they plan to attend, speak or present	Read the post and confirm the event edition
Event-content action	The person engaged with material related to the event	Useful context; it does not establish attendance
Official exhibitor, sponsor or speaker-company listing	A company has the stated relationship with the event	The specific team or person you could actually meet
Grounded research with no matched people	The event appears relevant to the market definition	More evidence is needed before making a buyer-attendance claim

Select **Open cited source** or **Open official source** where shown. Select **Open person** to inspect the buyer in Audience. Older evidence layouts may label this action **Open in Audience**.

Keep company participation separate from individual attendance. A company exhibiting does not mean every person you know there will be present. Check the year: a record for the previous edition cannot confirm a trip this year.

If the page shows an aggregate overlap result, read its scope and date. It can support an event comparison, but it does not identify the matched people or supply permission to contact them. Use the separately available person records for meeting preparation.

5.4 Compare events on access, fit and total cost

Copy this into the decision sheet for two or three plausible options:

Question	What to record
Buyer fit	Which relevant roles, companies and regions are represented?
Attendance evidence	Which current organizer records or explicit attendance statements exist?
Remaining uncertainty	What is only company participation, engagement or historical evidence?
Access	Can you book meetings, join useful sessions or meet people without a stand?
Full cost	Tickets, sponsorship, travel, team time and follow-up
Commercial purpose	Customer acquisition, partner recruitment, existing relationships or a defined mix
Next action	Attend, seek more evidence, negotiate a smaller package or decline

Do not choose solely by the highest overlap count. Coverage differs across events. A well-documented event may show more matches because more evidence is available, rather than because it contains more of your market.

Worked example - illustrative: Event A shows eight relevant people with current attendance evidence and offers a delegate pass. Event B has twenty relevant company listings and an expensive sponsorship package, but you have not established who you could meet. The sensible next step could be to prepare meetings for A and request stronger evidence for B. The comparison has improved your spending decision; it has not yet proved a revenue return.

If both events have weak coverage, keep the comparison open. Combine what Postelix can show with organizer information and your team's existing knowledge. Missing matches are not proof that an event is worthless.

5.5 Turn the research into a meeting plan

For each person you intend to approach:

01 Select **Open person** on the event card.

02 Confirm their current company, role and fit with the event objective.

03 Check whether a colleague already owns the relationship or has a conversation in progress.

04 Read the attendance evidence and one piece of relevant business context.

05 Record the owner, a useful conversation topic and the proposed next step in your meeting plan or CRM.

06 Use the outbound workflow in chapter 4 to prepare and review the message. Keep actual meeting arrangements in your normal calendar or event system.

The meeting plan should contain a person, a reason to speak and an owner. A list of familiar logos is not enough to organise the team's day.

When both you and the recipient have actually said you are attending, an opening could be:

> Hey Alex, saw you're heading to [event] too. We're going on [day]. Would be good to meet properly - fancy a coffee while we're there?

Use an existing conversation or a relevant business point if there is one. If you only know that their company is exhibiting, ask whether they are going; do not tell them you know they are attending. Do not imply that you have already met or that you have plans to attend unless that is true.

5.6 Give the team a plan for the day and the follow-up

Before travelling, agree the meetings, owners and practical schedule. Include time for useful unplanned conversations, but give each team member a clear priority.

After each conversation, record:

- What the person is trying to achieve.
- The issue or opportunity you discussed.
- Whether they fit the intended buyer or partner group.
- Any promised introduction, material or follow-up.
- Who owns the next action and when it will happen.

Follow up with the thing you actually discussed. A scanned badge records an interaction; it does not establish a qualified opportunity. If several colleagues met people from the same account, reconcile the notes before sending separate messages.

5.7 Review the investment after the event

Use your CRM and actual cost records alongside the initial Postelix research. Track the event edition and keep the reporting window consistent.

Review the useful meetings held, qualified next steps, opportunities created or advanced, and eventual customers. Compare those outcomes with the event's full cost. Cost per relevant meeting is a useful early measure; customer acquisition cost becomes meaningful only when the resulting customers can be identified.

For a repeat event, compare the current cycle with the previous one carefully. Changes in package, staffing, market conditions and follow-up can explain differences. Postelix's contribution is the buyer context used to choose the event and prepare the work; execution still matters.

Manager update:

> We chose [event and participation format] because [buyer evidence and access]. The total cost was [amount]. We held [number] relevant meetings and agreed [number] qualified next steps. [Opportunities or revenue] is recorded in the CRM. For the next edition, we recommend [repeat, change format, gather more evidence or stop], because [reason].

> **You have completed this workflow when:** the event decision has a documented reason, the team used the buyer research to prepare conversations, and the review connects actual outcomes with total cost.

CHAPTER / 06

6. Influencers: choose the voices that can reach your buyers

Use this when: you want to reach relevant buyers through someone else's content or community. **Allow:** 45-60 minutes of research, plus partner conversations. **Finish with:** a reasoned shortlist, one specific proposal and an agreed way to evaluate the collaboration.

6.1 Decide which buyers the collaboration should help you reach

Write down the buying roles, region and problem. Be precise about the intended result:

- Introduce the category to a relevant audience.
- Explain a difficult buying consideration.
- Put a useful resource in front of more practitioners.
- Start relevant conversations around a specific problem.

A collaboration designed for awareness should not be judged solely by immediate demo bookings. A campaign whose stated goal is demos must eventually be judged on qualified conversations and cost.

6.2 Build the shortlist in Voices

01 Open **Voices**.
02 Read **Profiles in this week's sample** and the measurement information.
03 Inspect an author's overlap count and denominator.
04 Distinguish a current sample from retained historical evidence.
05 Select **Open LinkedIn** and inspect the author's relevant content.
06 Use **Save voice** for a candidate worth keeping.
07 Repeat until you have three plausible options.

A result such as nine of 200 means nine of the sampled members had the measured relationship described in the product. It does not mean the author will reach nine buyers in your next post, or 4.5% of every possible customer.

A historical lower bound is also useful, but it answers a different question. Do not compare it directly with another author's fresh weekly percentage.

6.3 Inspect quality before ranking

For each candidate, review:

Question	What to record
Buyer relevance	Which intended roles and companies appear in the evidence?
Topic fit	Does the author discuss problems related to the campaign?
Evidence basis	Sample size, date and whether the view is historical
Audience duplication	Which known buyers appear around several options? Record unknowns.
Credibility	Does the content demonstrate useful experience?
Commercial fit	Would a collaboration be appropriate for both businesses?
Delivery	What format and distribution can the author actually offer?
Cost and effort	Cash, product access, preparation and team time

Use public evidence available to you and ask the creator for aggregate audience information where helpful. Do not promise access to private readership data.

If the app does not show a complete deduplicated comparison between two audiences, do not label a manually inspected sample as complete incremental reach.

6.4 Make a choice with the whole picture

Illustrative comparison:

Candidate	Observed overlap in comparable sample	Relevant context	Next decision
A	9 of 200	Several finance practitioners; practical posts on controls	Ask about an educational collaboration
B	8 of 200	Similar practitioners, but most visible discussion concerns another problem	Keep as an alternative
C	5 of 200	Smaller overlap, strong regional fit and useful case examples	Investigate if the region is the priority

Nine versus eight is too small a difference to carry the decision on its own. Candidate C could be the sensible choice if the campaign is regional and the format is better.

The useful result is a defensible next conversation, not an automatic ranking of people by commercial value.

6.5 Approach the creator with a specific idea

You can use **Draft peer note** where an appropriate connected sender is available. Read and edit it before sending.

A useful proposal:

> Hi Alex, your explanation of renewal ownership gave us an idea for a practical follow-up. We work with finance and legal teams and could contribute a short ownership checklist, with an example of where handoffs go wrong. Would that be useful for your audience?

If you have verified overlap worth mentioning:

> We found several relevant finance people engaging with your public posts in the sample we checked. I can share the aggregate context if useful.

Describe the data accurately. A small public-engagement sample is not a profile of every reader.

If the creator is interested, agree the topic, format, responsibilities, publication date, fee or exchange, and any sponsorship rights. A useful creator may prefer cash; another may value access or expertise. Ask rather than assume.

6.6 Agree the collaboration and record the relationship

In **Voices**, use **Relationship**:

- **Saved** while investigating.
- **Working together** when a collaboration is agreed.
- **Paid collaboration** when that accurately describes it.
- **Hidden** for an unsuitable suggestion.

For the collaboration deliverables, agree:

01 The intended buyer and problem.
02 The contribution each party makes.
03 Any factual claims that need support.
04 The publication and distribution plan.
05 Any review of confidential or customer material.
06 How results will be shared.

Keep the creator’s voice intact. Provide factual input and useful material rather than a generic endorsement script.

6.7 Keep the partnership shortlist current

Return to **Voices** when you prepare the next collaboration. Recheck the evidence date, sample and relevance to the campaign.

A saved candidate is a research note, not a commitment to sponsor them. Review their current work and the results of any previous collaboration before repeating the spend.

If the audience definition or evidence coverage has changed, record that beside the comparison. A larger overlap can reflect better coverage rather than a sudden increase in buyer interest.

6.8 Measure the collaboration

Keep the post URL, date, topic, agreed distribution and total cost.

Review:

- What the creator reports about delivery.
- Relevant public engagement observed in Postelix.
- Visits or enquiries supported by tracking.
- Qualified conversations and later opportunities.
- Preparation time and whether the format is repeatable.

Compare with your own content only when the audience, period and objectives make the comparison meaningful. A paid collaboration and an unpromoted founder post have different distribution conditions.

Manager update:

> We selected [partner] because of [buyer and topic evidence], then agreed [format] at [cost]. The resulting delivery was [result], with [buyer response] and [commercial progress]. We recommend [repeat, adjust or stop].

> **You have completed this workflow when:** the collaboration is chosen for a clear reason, delivered as agreed and reviewed against its actual objective.

CHAPTER / 07

7. Measurement: connect the activity to a result the business recognises

Use this alongside your first workflow. Allow: 20 minutes to establish the baseline, then 15-20 minutes per review. **Finish with:** a record of delivery, buyer response, commercial progress and cost.

7.1 Choose a small scorecard

Use one primary outcome and a few supporting measures.

Workflow	Primary question	Supporting evidence
Ads	Did the reviewed audience improve qualified response at an acceptable cost?	Delivery, audience quality, relevant enquiries, opportunities
Outbound	Did the account priorities and relevant openings produce useful conversations?	Research time, accounts approached, substantive replies, qualified meetings and progress
Events	Did the chosen event produce useful buyer or partner access at an acceptable total cost?	Attendance evidence, meetings held, qualified next steps, opportunities and full event cost
Influencers	Did the distribution deliver useful access and response for its total cost?	Reported delivery, observed buyer engagement, enquiries and opportunities

Set the review period around the buying cycle. A week can reveal a broken campaign or poor targeting input. It may be too short to judge customer acquisition.

7.2 Keep the sources of measurement distinct

Use Campaign Manager for paid delivery and spend. Use Postelix for the buyer context and available observations. Use the CRM for opportunities and customer outcomes.

A practical review sheet has these columns:

Date	Audience / campaign version	Spend and labour	Delivery	Observed relevant response	Qualified progress	Decision

Useful calculations include:

- Cost per qualified enquiry = relevant acquisition cost divided by qualified enquiries.
- Research time saved = comparable previous task time minus current task time.

- Relevant-response rate = relevant responses divided by the inspected responses, using the same inspection method.
- Cost per retargetable member = attributable spend divided by eligible unique audience growth, where the platform supports that measurement.

Avoid dividing by zero or presenting a tiny denominator without the count. An improvement from one enquiry to two is useful to record; it is weak evidence of a stable doubling.

7.3 Read Company attention

01 Open **Company attention**.
02 Review the public company sources and their collection status.
03 Inspect the campaign or post you are evaluating.
04 Read **Named post engagers** and the associated evidence.
05 Use **Tagged site sessions** and **Resolved companies** only where available.
06 Open important people or accounts and verify fit.
07 Compare the findings with Campaign Manager and the CRM.

Source health matters. If capture stops, a flat response graph may reflect a collection problem. Check that before concluding that the audience stopped responding.

A company-level site observation stays company-level until an independent source identifies a person. A public post reaction stays public post engagement unless its source supports a more specific attribution.

7.4 Use the readout to choose the next action

01 Open **Readout**.
02 Select the relevant period.
03 Read the coverage and status before the narrative.
04 Inspect evidence behind the important claims.
05 Write down the one finding that changes your next action.
06 Assign the action to a person and date.

If the readout is evidence-only or says the data is too thin, use the available evidence sections and investigate coverage. Do not wait indefinitely for a polished story, and do not present one that the product has withheld.

Use **Refresh this week** when a new run is appropriate. Repeated refreshes are not a substitute for better source coverage.

For sharing:

01 Use **Print / PDF** for a document.
02 Or open **Share this readout**.
03 Choose the available expiry.
04 Select **Create and copy link**.
05 Preview the shared output and confirm it is suitable for the recipient.
06 Use **Revoke** when access should end.

Shared output can include a curated sample. Review what is actually shared rather than assuming every share link contains aggregates only.

7.5 Put the warming score in context

Use the score and its explanation as a summary of the product's defined observable activity. Read any provisional or comparability warning.

Keep the definition and denominator stable when comparing periods. A source change, audience expansion or historical import can alter the view without indicating an improvement in marketing performance.

Your manager should see the score beside concrete decisions and commercial results. A score can help direct attention; customer revenue and acquisition cost remain business outcomes.

7.6 Decide whether to continue, adjust or stop

Write the rule before reviewing the results:

- **Continue** when the output is used, the evidence is credible and the response supports further work.
- **Adjust** when you can identify a specific issue with audience, message, delivery, tracking or handoff.
- **Stop this workflow** when the intended buyers are not observable enough, the output does not change decisions, or the economics do not justify it.

Avoid universal kill rules such as "every creative below a fixed CTR must be stopped." The relevant click type, audience, objective and sample size matter.

You have completed this workflow when: someone can read the report and understand what changed, what happened and why the next action follows.

CHAPTER / 08

8. Optional: build a retargeting route when the audience supports it

Use this when: you already have advertising activity, approved tracking and an eligible audience. **Allow:** 30-45 minutes of operator setup, plus audience collection. **Finish with:** a usable retargeting audience and an offer appropriate to its source.

This is an optional advertising module. You can get value from the other workflows without launching another campaign.

8.1 Choose the source

In Campaign Manager, inspect the available audience sources: website visitors, supported ad engagement, video views or other eligible sources.

Pick one that matches the next action. Someone who visited a relevant solution page has different context from someone who made a broad interaction with an ad.

Do not assume everyone in a retargeting pool is a qualified buyer. Review available audience attributes and exclusions.

8.2 Build a website audience

Ask the website or tracking owner to confirm the Insight Tag and the organisation's required consent controls are correctly configured.

Then:

01 Open **Campaign Manager → Plan → Audiences**.
02 Select **Create audience → Matched Audience**.
03 Choose **Website**, then **Next**.
04 Name the audience and choose **When did they engage?**
05 Select the appropriate Website Actions or manual URL route.
06 For URLs, choose the matching rule and enter the intended page.
07 Review the result and create the audience.

Check the current LinkedIn instructions for the available rules and how the audience accumulates. Creating an audience today does not imply a full historical pool is immediately available. Website audience setup

8.3 Build an engagement audience where supported

Follow the eligible ad-source option in **Matched Audience**:

01 Choose the relevant ad type.
02 Select the interaction or view threshold offered.
03 Select the source ad sets and time window.

04 Name and create the audience.
05 Monitor its status and unique-member count.

For Thought Leader Ads, verify the actual source eligibility offered in your ad account. Do not build the strategy on an assumed retargeting capability.

Total engagement is not the same as the number of unique eligible members. LinkedIn retargeting overview

8.4 Make the follow-on offer match the first interaction

If the first content explained a renewal-ownership problem, a relevant follow-on could be a checklist, walkthrough or consultation on that process.

Keep the path coherent:

> Useful idea → relevant follow-on resource → a business conversation when appropriate.

Use a demo call directly when the audience and offer justify it. A low-friction resource is an option, not a mandatory detour for every business.

Set the objective, creative, budget and exclusions deliberately. Do not increase spend just because the pool is small.

8.5 Troubleshoot before attributing failure

A small pool can result from limited source activity, eligibility, timing, matching, consent settings or narrow filters. Inspect those causes.

A weak landing-page result can involve the offer, message, page, audience or tracking. Change the specific issue you can substantiate.

> **You have completed this workflow when:** the source is eligible, the audience is usable, the offer follows logically and you can measure the intended response.

CHAPTER / 09

9. Handoff: make the work easy for the next person

Allow: 30-60 minutes for a basic handoff; integration setup can take longer. **Owner:** the marketing operator and the person responsible for the destination tool. **Finish with:** one place for decisions, one place for customer truth and clear ownership.

9.1 Start with the smallest handoff that works

A reviewed export and a short brief can be sufficient for the first week.

In **Audience → Export**, choose the appropriate people or company file and fields. Use a selected cohort when the recipient needs only that group. A general company export and an Ads-formatted CSV serve different purposes; use **Ads** for Campaign Manager preparation.

From **Home** or **Leads → Today**, use **Export these N** where available to export the displayed work.

Include these practical fields in the handoff:

- Company and person.
- Current role.
- Source link and date.
- Why the finding matters.
- Suggested next action.
- Existing relationship or exclusion.
- Owner and next-action date.

The owner can then act without recreating the research.

9.2 Connect HubSpot when the workflow is ready

Open **Settings → Integrations → HubSpot**.

01 Have the workspace or integration owner complete the connection using the setup available to your account.
02 Select **Connect HubSpot** when the required setup is ready.
03 Run the available sync and inspect its status.
04 Test a small approved handoff and inspect the destination record.
05 Confirm customer and active-opportunity handling before using the integration broadly.

For a selected handoff, use **Send to HubSpot** where available and review the confirmation and skipped-record reasons. A successful connection alone does not prove every record was sent.

Keep connection details in the authorised setup flow. Ask your workspace administrator or Postelix setup contact for help if the connection is not ready.

9.3 Connect Slack for actionable notifications

Open **Settings** → **Integrations** → **Slack**.

01 Agree the destination channel and the person responsible for it.
02 Have the authorised owner complete the connection setup.
03 Select **Connect Slack**, then **Send test**.
04 Confirm the test reached the intended channel.
05 Agree which notifications deserve action and who will respond.

Each useful notification should have an owner. If everyone assumes someone else will respond, more alerts create more noise.

9.4 Use Instantly only when email is part of the plan

Open **Settings** → **Integrations** → **Instantly**.

01 Have the email owner complete the authorised connection setup.
02 Select **Connect Instantly** when ready.
03 Keep the destination campaign paused while testing the handoff.
04 Check the people, addresses and fields received.
05 Confirm how replies, opt-outs and customer exclusions will be kept aligned.
06 Let the email owner review the campaign before sending.

A successful transfer is not a sending approval. Use the same exclusion rules across the tools your team operates.

9.5 Other systems

Start with a reviewed export if the destination connection is not ready. Agree the fields, owner and next action so work can continue.

For a connected workflow, ask the integration owner or Postelix setup contact to confirm support for your destination and the setup required. Test a small approved handoff and confirm that failures and exclusions are visible.

An available connection route is not the same as a completed integration.

You have completed this workflow when: the next person receives useful context, understands the action and records the outcome where the rest of the team can find it.

CHAPTER / 10

10. The business case: show what changed and what it was worth

The question after a demo is often, “What do we get that we cannot already do ourselves?”

The strongest answer is specific to the work.

A team can research public information manually. It can build lists. It can inspect campaign results. The buying decision is whether maintaining buyer context across those tasks produces enough recurring benefit to justify the subscription and operating time.

10.1 Separate the three kinds of value

Value	Evidence you can show	What to avoid
Better decisions before spending	A changed ad audience, account priority, event or influencer choice with its reason	Claiming hypothetical savings as realised savings
Less repeated work	Comparable task timings and a handoff people actually use	Treating all saved time as cash removed from payroll
Better commercial results	Qualified enquiries, opportunities, customers and costs over a suitable period	Calling engagement or pipeline value realised revenue

You may demonstrate one before the others. Report that sequence honestly.

10.2 Work out the full cost

Include:

- The actual Postelix subscription.
- Internal review and operation time.
- Any additional data or integration costs.
- Advertising or creator spend added for the workflow.
- Any other cost required to execute the change.

If you use an existing campaign budget, show it as the campaign’s cost. Do not suggest that the software itself includes distribution.

10.3 A practical break-even example

Illustrative numbers only:

Suppose a company pays €490 per month for the software. It spends four hours operating the workflow, valued internally at €50 per hour. The monthly evaluation cost is €690 before any additional campaign spend.

If comparable research previously took twelve hours and now takes four, that releases eight hours, valued at €400 using the same internal rate. That is capacity the team can use elsewhere. It is not automatically a €400 cash saving.

The remaining justification could come from better campaign performance, useful decisions that avoid unnecessary expenditure, or more valuable use of the released capacity. Record the result rather than assuming it.

For a customer-acquisition outcome, use contribution over an appropriate time period and include the acquisition costs. Do not compare total contract revenue with only the software fee.

10.4 Report a useful first month even before sales close

A strong first-month report might say:

> We used the audience in one ad campaign and the buyer evidence to prioritise outbound accounts. We corrected 18 unsuitable accounts before launch and reduced preparation time from [baseline] to [measured time]. The campaign generated [delivery], [qualified response] and [opportunities]. We have not yet observed closed revenue. Next month we will test [specific change] and review [measure] on [date].

All numbers must come from your actual work. This is a reporting structure, not a Postelix case study.

An equally valid report can say that coverage was insufficient and the workflow should not continue. Clear evaluation criteria make that decision easier.

10.5 Copy this internal approval note

Subject: Postelix evaluation for [campaign]

> **Problem:** We currently [describe the task or uncertainty] using [current process]. It costs [time or spend] and leaves [specific gap]. **Use:** We will use Postelix to [target ads / prioritise outbound accounts / choose events / select influencers]. **First deliverable:** [Artifact], ready for [owner] to use by [date]. **Cost:** [Subscription] plus [operator time and any incremental spend]. **Success criteria:** [A usable output], [an operational improvement] and [the relevant commercial measure over its appropriate period]. **Review:** On [date], we will continue, adjust or stop based on the evidence. **Fit with our stack:** [CRM] remains the customer record. [Advertising platform] remains the delivery and spend record. Postelix supplies maintained buyer context for the decisions between them.

10.6 Answer the common objections directly

"We already have Clay or a contact database."

Identify what that setup already does well. Then test whether Postelix contributes useful ongoing buyer context to a specific campaign or distribution decision. If the same useful result is already produced reliably at lower total cost, the extra tool needs another justification.

"We already know our customers."

Use that knowledge to make the audience better. The practical question is whether the team can turn it into reviewed ad targeting, focused outbound and better event or influencer decisions without repeated research.

"Can you guarantee ROI immediately?"

The first useful output should arrive as soon as the necessary evidence and setup are ready. Realised ROI depends on execution, cost and the buying cycle. Agree a concrete first deliverable and how its business value will be evaluated.

"Who will run this?"

Name one operator and the person who acts on each output. Start with one workflow. Add users, sources or integrations when they make that workflow easier.

"What keeps this useful after the first export?"

Changing roles, new observations, changing sources and the next campaign decision can justify ongoing maintenance. The recurring benefit must show up in repeated use, not just a growing record count.

CHAPTER / 11

11. Keep a weekly rhythm your team can sustain

Start with one main workflow and a short review. Adapt these planning times to actual use.

When	Task	Planning time
Monday	Read the current evidence and choose one priority	20 min
Twice weekly	Execute or update the chosen ads, outbound, event or influencer task	30 min each
Each working day, if sales follow-through is active	Review the small action queue and record outcomes	15 min
Friday	Review results and prepare the manager update	25 min
Monthly	Reconcile the audience with customer truth and decide what continues	45 min

That is about three hours weekly for review, execution and a small daily sales queue, plus the monthly reconciliation. Creative production, event attendance, meetings, complex integrations and campaign management can add time. Plan for them explicitly.

The Friday review

01 What did we actually use?
02 Which decision changed?
03 What new evidence arrived?
04 What was historical or newly discovered rather than newly occurring?
05 What happened after the action?
06 What did the work cost?
07 What will we do next week?

If the same insight appears every week without a new decision or action, narrow the reporting. The aim is useful work, not a longer digest.

Refresh the campaign audience when it matters

01 Review the market and exclusions.
02 Prepare a new company file in **Ads**.
03 Give it a distinct date/version.
04 Upload and check matching.
05 Switch the intended ad set only when the new audience is ready.
06 Record which version was used for each reporting period.

Keep old campaign references for comparison. Avoid changing the audience every day while trying to assess the same test.

CHAPTER / 12

12. When something does not work

What you see	Check first	Practical next action
Many high-scoring people look wrong	Offer sentence, buyer roles and source mix	Correct the common cause, then review another sample
Relevant companies are missing	Company identity, region, source coverage and public visibility	Document the gap and add a relevant source if available
No people match the buying-role filter	Whether buyer roles are configured	Correct setup before concluding the market is empty
Few names during the first build	Build and source status	Allow collection to complete; investigate errors or stalled progress
A company CSV cannot be used	Row count, headers, identity fields, match result and final filters	Correct the actual issue; choose another route if the valid audience is too small
Ads deliver but useful responses are weak	Audience, message, intended action and actual delivery	Change one supported hypothesis and keep the comparison clear
An event has few or no matched people	Evidence dates, source coverage and the current event edition	Seek stronger evidence; do not treat low coverage as proof that buyers will not attend
Voices has few results	Sample coverage, dates and market activity	Use available evidence cautiously; do not invent a full ranking
Readout is evidence-only	Evidence status and source health	Work from verified observations and resolve coverage
Postelix and Campaign Manager counts differ	Event definitions, unique people, time windows, paid versus organic	Reconcile definitions rather than forcing equal totals
Outreach controls are unavailable	Sender connection, role, plan and enabled capability	Follow the specific status message; use the authorised account
CRM handoff skipped records	The stated skip reasons and destination fields	Fix the small test before broad handoff
Another teammate contacted the same company	Ownership and relationship reconciliation	Assign one owner and update both systems
The tool is useful but nobody acts	Missing operator, unclear output or an oversized workflow	Pick one decision, one owner and one date

When asking for help, include the screen, intended action, visible status and a relevant record or export reference. Describe what you expected and what happened. This is much easier to resolve than “the data looks wrong.”

CHAPTER / 13

13. Your first working session

If you are unsure where to begin after the demo, use this agenda with your Postelix contact.

Minutes	Work
0-10	Confirm the buyer group, current process and one decision due soon
10-20	Inspect a small audience sample and the evidence behind it
20-35	Prepare the first useful output using the relevant workflow
35-45	Agree who will use it, the review date and success criteria

Bring the campaign brief, the intended buyer and what you already use to make the decision. A full CRM export or a new advertising budget is not required just to assess fit.

Leave with a sentence you can act on:

> By [date], [owner] will use [Postelix output] to change [specific campaign or task]. We will review [evidence and outcome] on [date].

That is the beginning of an operating habit your manager can understand.

KEEP THIS HANDY

Quick reference

Task	Start here
Correct the buyer definition	Setup → Market
Inspect people and fit	Audience → People
Inspect companies and contacts	Audience → Accounts
Investigate repeated mismatches	Setup → Market, then workspace owner
Prepare a LinkedIn audience	Ads → choose cohort → Prepare company file
Prepare role targeting	Ads → Choose the accounts, then define who inside them
Check competitor activity	Competitors → relevant competitor → captured posts
Research influencers	Voices → Open LinkedIn → Save voice
Inspect event opportunities	Events → Why it fits this market → Open event site
Review event people	Events → People from your market → Why this person is here → Open person
Associate campaign context	Company attention → Manual measurement → Add manual measurement
Review suggested actions	Home → Do now, or Leads → Today
Prepare a message	Prepare outreach → Leads → Drafts
Review replies	Leads → Inbox
Inspect the weekly findings	Readout
Share a readout	Readout → Share this readout → Create and copy link
Connect destination tools	Settings → Integrations
Add capture-only teammates	Settings → Team capture

About this edition

This public edition describes the customer workflows reviewed on 7 September 2026. Availability varies by workspace, role, connection and plan; released screens may change. Follow the status shown in your workspace and ask for setup help if a documented control is unavailable.

This edition is intended for public sharing. Detailed connection setup is handled by the authorised workspace owner.

The examples in this guide are illustrative. They are intended to show how to execute and evaluate the work, and are not reported customer outcomes. External platform instructions link to LinkedIn's own help pages at the point of use.