The outreach core sheet

Updated Sep 30, 2026

BOLD OUTREACH CORE fills itself in from Instantly within seconds: every email sent, every reply, and a scoreboard per campaign. The team works from its Replies tab and adds to Do not contact; the tracker fills in the rest.

6 steps · 4 min · 2 watch-outs

Watch it first: the outreach core sheet in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/docs-outreach-core-sheet.mp4

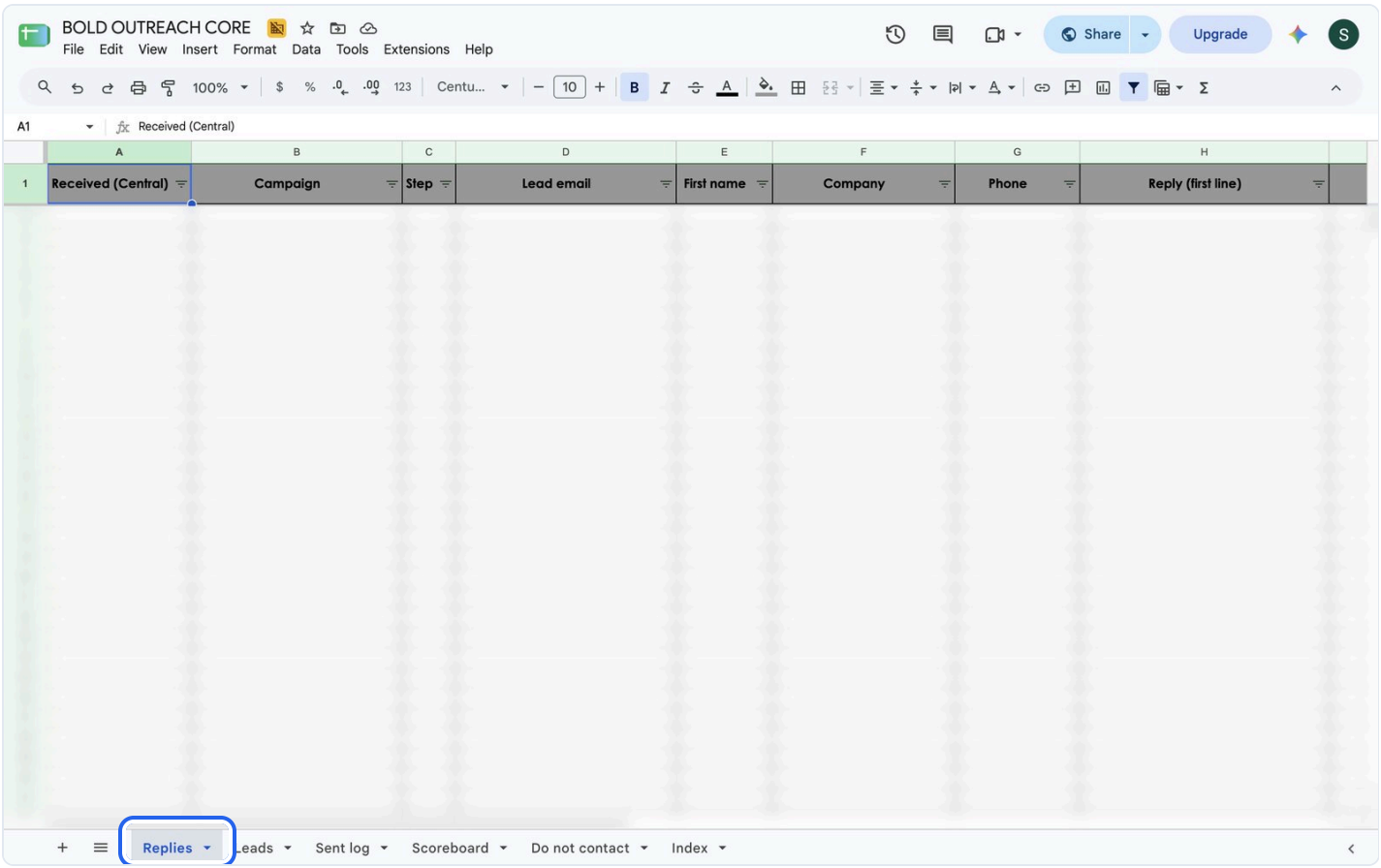
6 steps, each with the screen you will see

1. Replies
2. Leads
3. Sent log
4. Scoreboard
5. Do not contact
6. Index

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Replies

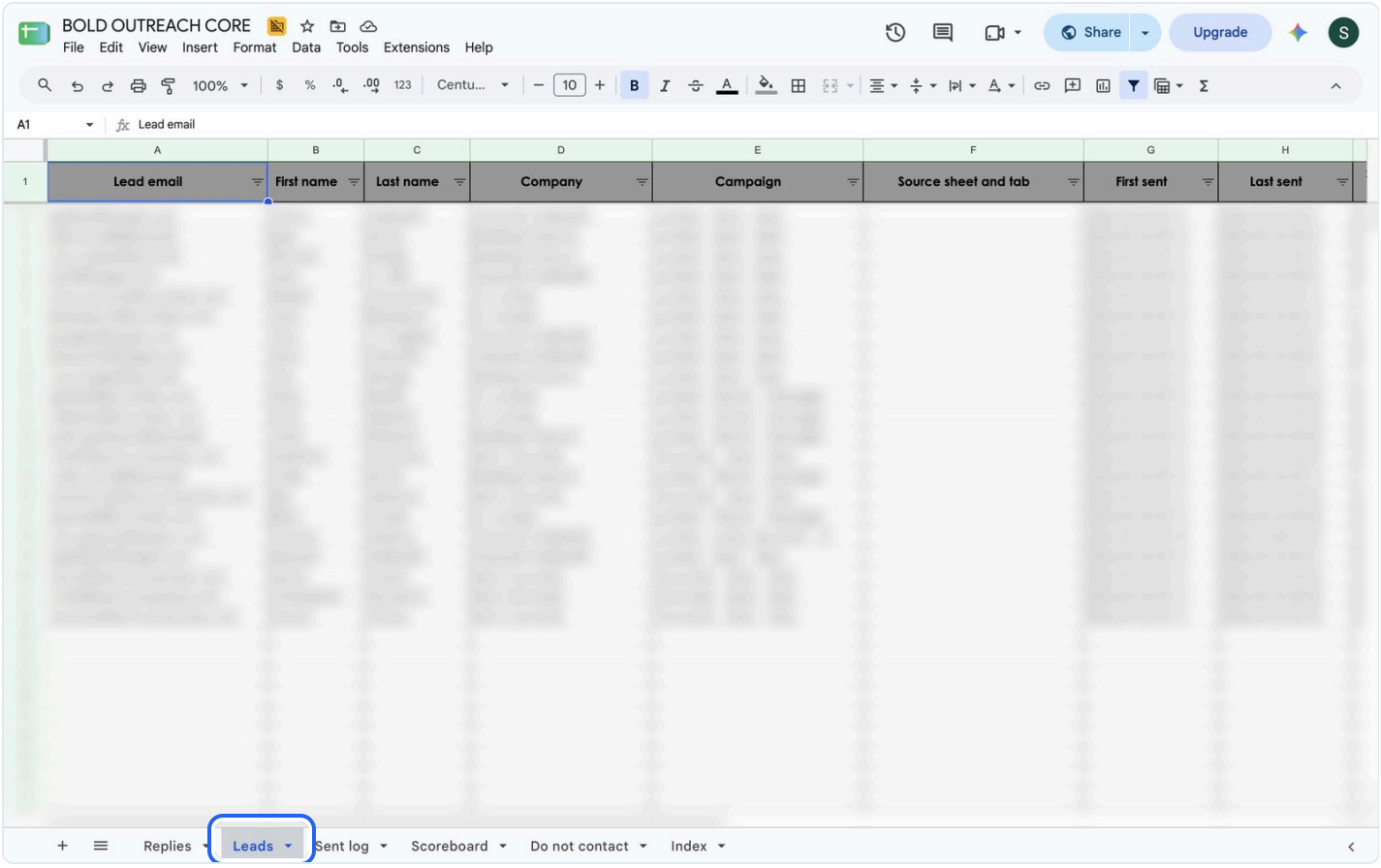
Replies gets one line per reply, newest on top, with the person's phone number and what they wrote. You fill in the last five columns: owner, next action, called, outcome and notes.



> ⚠ **Watch out.** Type only in those last five columns. The tracker writes the others, and a changed cell can break the line it belongs to.

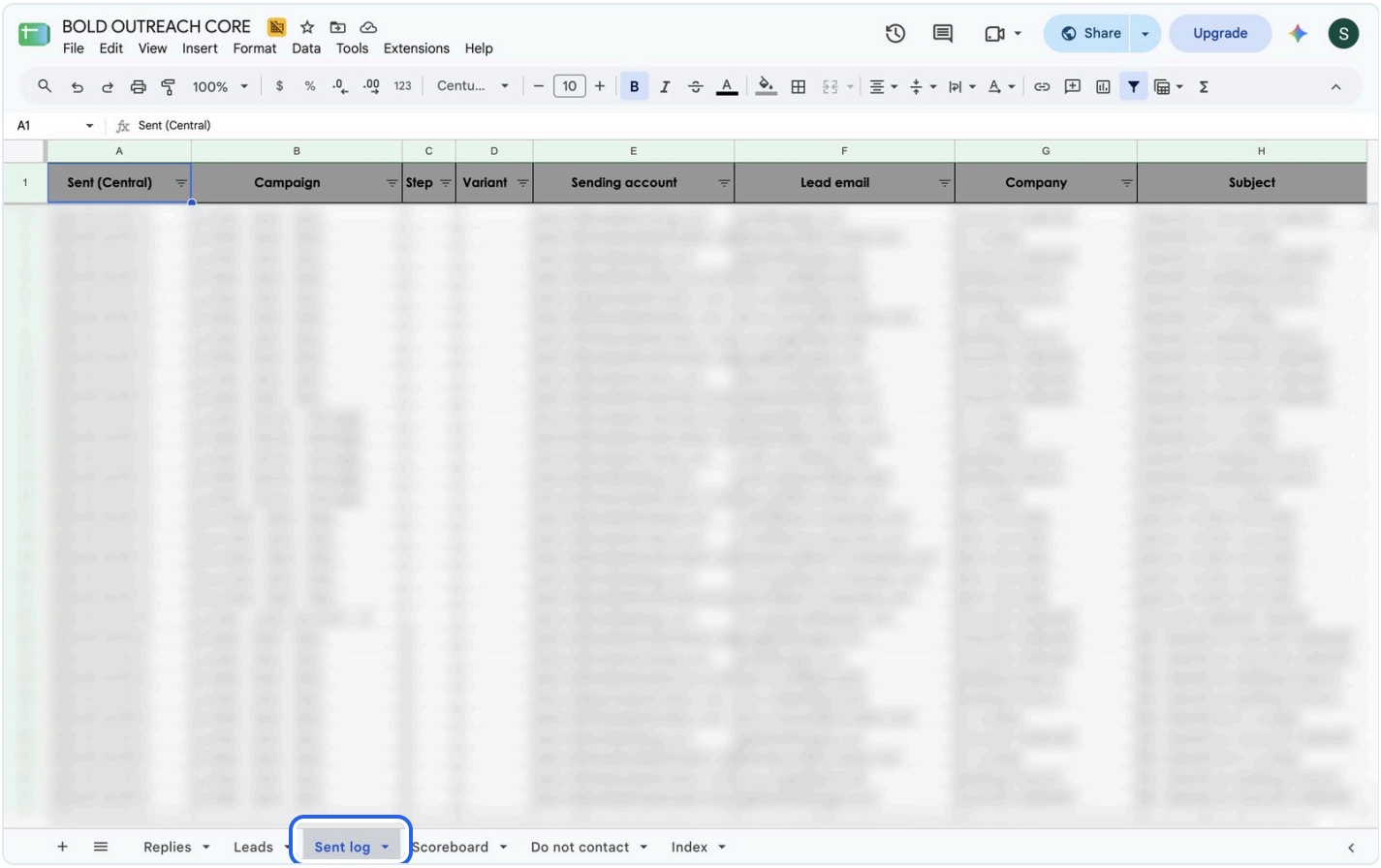
2 Leads

Leads has one line per person emailed, with the campaign and when the first and last emails went out.



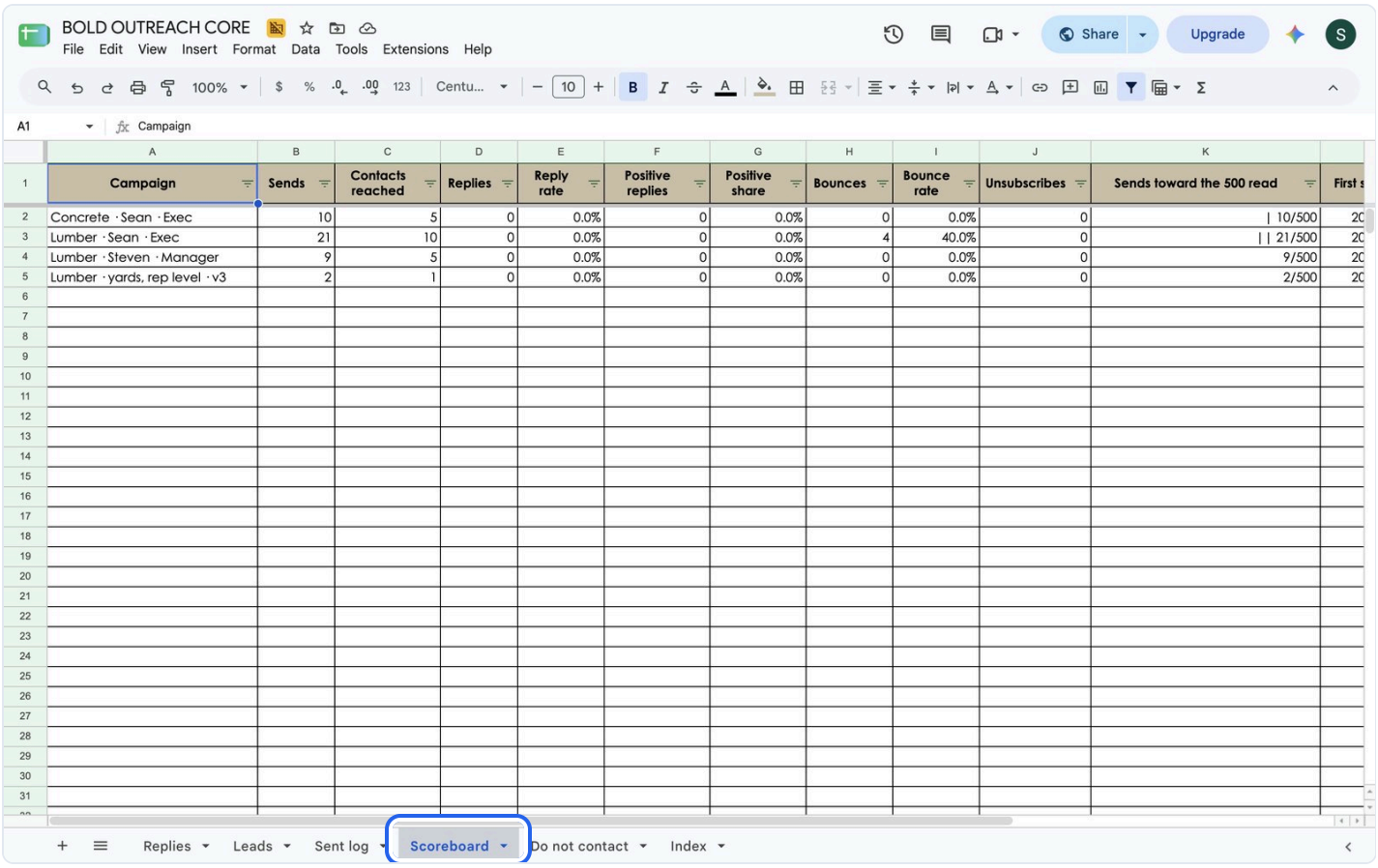
3 Sent log

Sent log lists every single email sent, one line each.



4 Scoreboard

Scoreboard adds it up per campaign: emails sent, replies, bounces and the bounce rate. Here one campaign shows a bounce rate of 40 percent, far over the limit of two.

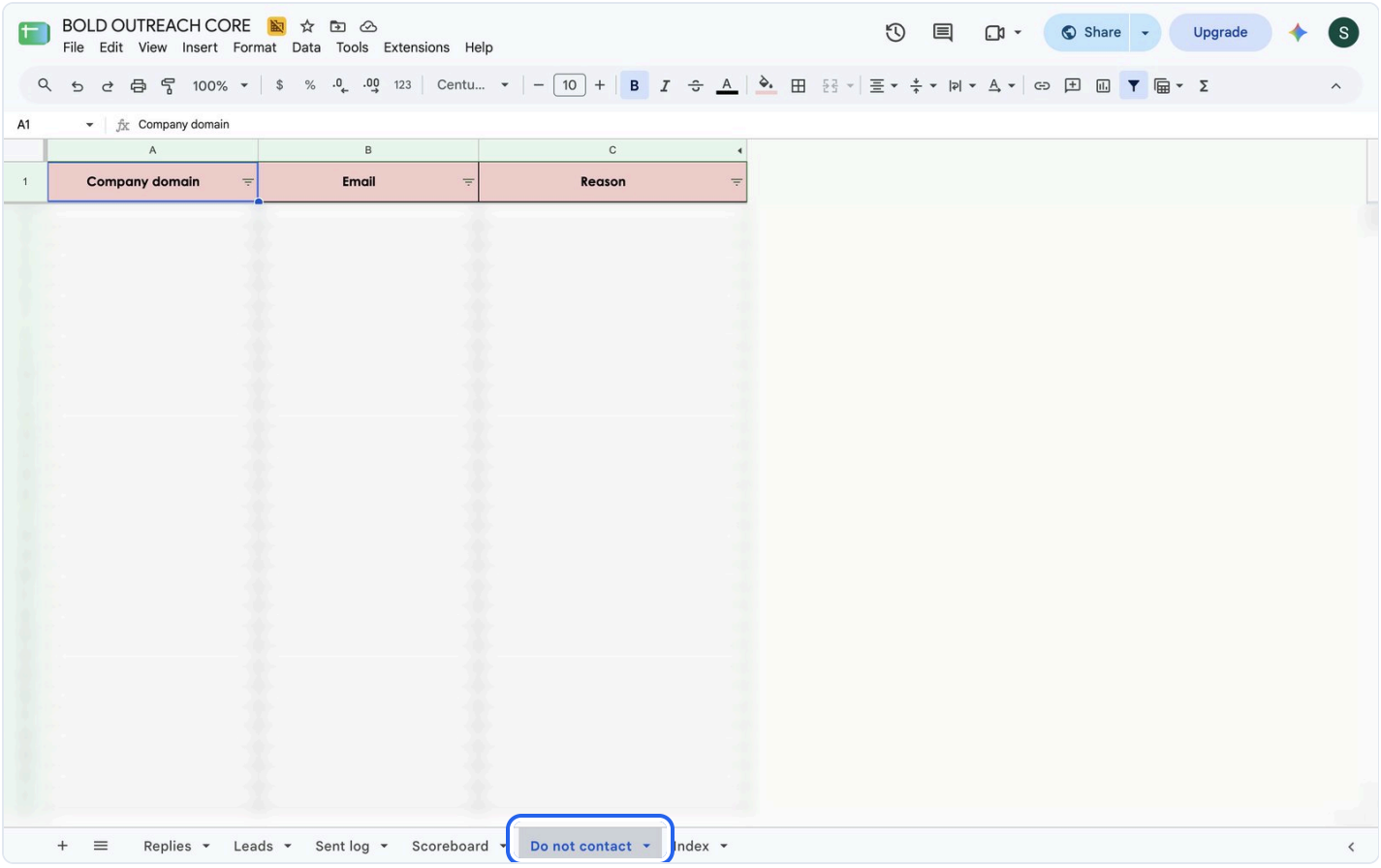


Campaign	Sends	Contacts reached	Replies	Reply rate	Positive replies	Positive share	Bounces	Bounce rate	Unsubscribes	Sends toward the 500 read
Concrete · Sean · Exec	10	5	0	0.0%	0	0.0%	0	0.0%	0	10/500
Lumber · Sean · Exec	21	10	0	0.0%	0	0.0%	4	40.0%	0	21/500
Lumber · Steven · Manager	9	5	0	0.0%	0	0.0%	0	0.0%	0	9/500
Lumber · yards, rep level · v3	2	1	0	0.0%	0	0.0%	0	0.0%	0	2/500

> ⚠ **Watch out.** A bounce rate over 2 percent means the list had bad addresses. Pause that campaign in Instantly and check where its list came from before it sends again.

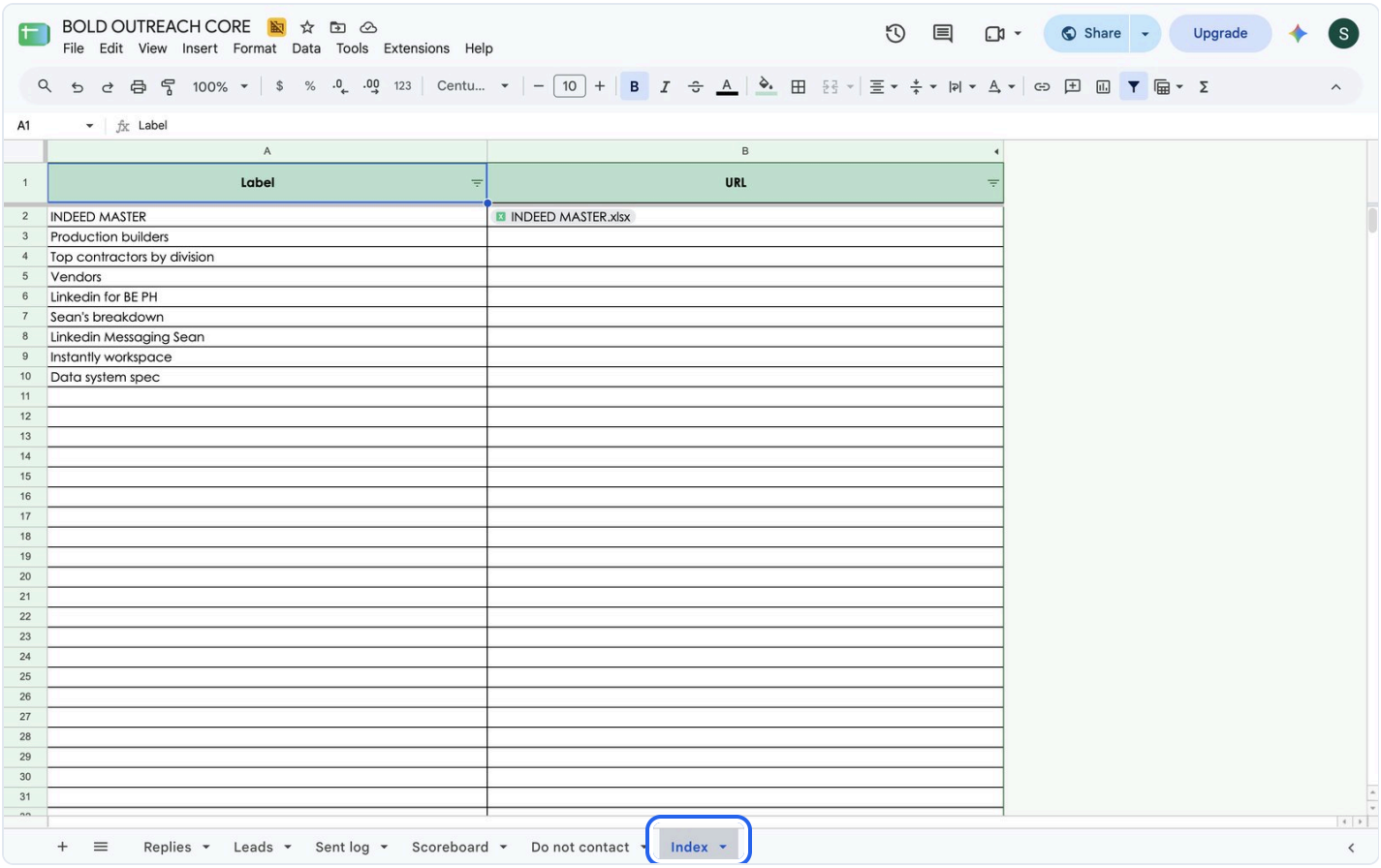
5 Do not contact

Do not contact is for current clients, past clients and anyone who said no. Add a company here when it asks not to be emailed, and every future list skips it.



6 Index

Index links to the other sheets the team uses.



2 watch-outs to keep in mind

Before you click

- ⚠ Type only in those last five columns. The tracker writes the others, and a changed cell can break the line it belongs to.
- ⚠ A bounce rate over 2 percent means the list had bad addresses. Pause that campaign in Instantly and check where its list came from before it sends again.