

Outreach and Buying Signal Engine

A controlled way to identify companies likely to need specialist EPM talent soon, select the right people, and route timely outreach into consultant action.

The market engine shows who exists. The outreach engine shows who is worth contacting now, and why.

Signal

companies likely to need talent

Select

the right decision-makers

Route

timely consultant action

The business result

- Consultants can focus on companies showing evidence of future hiring need.
- Decision-makers are prioritised by timing, role fit, and evidence strength.
- Outreach is controlled by agreed rules rather than sent as a broad campaign.
- Replies and outcomes feed back into the score so the system improves over time.

Buying and hiring signals

System and project signals

- New OneStream, Anaplan, EPM, ERP, financial planning and analysis, or consolidation implementation announcements.
- Finance transformation, reporting transformation, or systems modernisation activity.
- Implementation partner case studies, project pages, or customer announcements.
- Companies appearing in vendor, partner, event, webinar, or case-study ecosystems.

People and company signals

- New CFO, finance director, financial planning and analysis leader, transformation leader, or programme director.
- Private equity investment, acquisition, merger, IPO preparation, or restructuring.
- Expansion into new regions or new finance operating models.
- Annual report, investor update, or press release language suggesting finance systems change.

Hiring activity signals

- Job adverts for OneStream, Anaplan, EPM, financial planning and analysis systems, consolidation, reporting, or finance systems roles.
- Repeated hiring activity for finance systems or transformation roles.
- Contractor, implementation, programme, data, integration, or reporting roles linked to the EPM market.
- Signals that an implementation has landed but the internal team is not yet fully built.

Outreach flow

1

Signal detection

Purpose

Identify companies with relevant activity and capture the reason they have been flagged.

Output

A company-level signal with source, date, confidence, and reason text.

2

Account scoring

Purpose

Score companies by market fit, timing, signal strength, geography, sector, and likely hiring need.

Output

A ranked list of companies worth consultant attention.

3

Contact selection

Purpose

Identify relevant decision-makers, influencers, and hiring owners inside high-fit companies.

Output

A contact list with role fit, contact confidence, and recommended next action.

4

Message lane

Purpose

Group contacts into outreach lanes such as new implementation, leadership change, hiring activity, or transformation announcement.

Output

A recommended outreach angle that matches the reason the company was flagged.

Controlled outreach

Before sending

- Agree approved source policy.
- Agree send limits and review thresholds.
- Confirm suppression and opt-out rules.
- Confirm reply ownership.
- Approve message lanes and sequence drafts.

After sending

- Track sent, replied, interested, not relevant, and follow-up required.
- Route replies to the right consultant.
- Review which signals create conversations.
- Tune scoring and messaging for the next cycle.
- Increase volume only after quality is proven.

Outreach should begin as a controlled pilot. The aim is to start better conversations, not simply increase email volume.

Delivery route

0

Outreach governance and rules

Purpose

Confirm approved sources, outreach rules, send limits, suppression rules, reply ownership, and human review thresholds.

Output

Agreed outreach rules, suppression rules, first message lanes, and reply routing process.

1

Buying signal library

Purpose

Create the first version of the buying and hiring signal library.

Output

Signal categories, search terms, source types, account scoring rules, and signal confidence rules.

2

Signal monitor and first target list

Purpose

Build the first signal-led list of companies showing timely market activity.

Output

Companies with evidence-backed signals, reason text, account score, source, and confidence fields.

3

Contact selection and worklists

Purpose

Find relevant people inside high-fit companies and route them into consultant action.

Output

Decision-maker lists, contact fit scores, recommended next actions, and consultant worklists.

Pilot and optimisation

4

Message lanes and controlled outreach setup

Purpose

Prepare approved message lanes and operational controls before sending.

Output

Message lane structure, approved sequence drafts, send limits, suppression rules, and reply routing.

5

Pilot outreach and optimisation

Purpose

Run a controlled pilot, review outcomes, and tune scoring and messaging.

Output

Sent, replied, interested, not relevant, and follow-up statuses, plus signal-to-reply quality review.

Scope boundaries

- Outreach should not start until source policy and suppression rules are agreed.
- Signal scoring should be evidence-backed rather than guesswork.
- Uncertain records should be reviewed before outreach.
- Reply ownership should sit clearly with Henderson Drake's team.
- Sending volume should start controlled and increase only after quality is proven.

TIMELINE

Indicative build timing

Stepping stone	Indicative time
Outreach governance and rules	1-2 working days
Buying signal library	2-4 working days
Signal monitor and first target list	4-7 working days
Contact selection and worklists	3-5 working days
Message lanes and controlled outreach setup	3-5 working days
Pilot outreach and optimisation	5-10 working days

Expected first working outreach version: 3-5 working weeks, assuming decisions and source policy are agreed quickly.

Combined milestone	Indicative time
First visible market-map proof	1-2 weeks
Working market engine with JobAdder-ready output	3-5 weeks
Outreach and buying-signal engine v1	3-5 additional weeks, with some overlap possible
Full first system covering market map, signals, worklists, and controlled outreach	6-9 weeks
Expanded build with deeper JobAdder intelligence, CV Engine, Gap Auditor, and wider market coverage	10-14+ weeks

DECISION

Recommended first use case

Start with one signal-led outreach use case, prove that the target companies and contacts are relevant, then expand signal coverage.

Good first use cases

- Companies showing OneStream or Anaplan implementation signals.
- Companies with a new CFO or finance transformation leader.
- Companies actively hiring EPM, financial planning and analysis systems, consolidation, or finance transformation roles.

First proof should show

- Which companies were flagged.
- What signal triggered the flag.
- Who the relevant decision-makers are.
- Why they were prioritised.
- What the recommended outreach lane would be.

Positioning statement

This gives Henderson Drake a more timely way to find future clients: not just companies in the market, but companies showing evidence that they may need specialist EPM people soon.