sendkit

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PLAYBOOK

7

The Cold Email Agency Operating System

The onboarding, sending, reporting, and retention system behind agencies that keep clients past month three.

WHY THIS EXISTS

Most cold email agencies die in month three.

Not because the campaigns failed. Because the agency never built a system. Client onboarding lived in a founder's head, reporting was a screenshot at 11pm, and the first deliverability dip became a churn call nobody could answer. This is the operating system that fixes that.

A cold email agency is not a campaign service. It is an operations company that happens to send email. The agencies that scale past five clients all run the same seven systems — onboarding, infrastructure, sending, inbox management, reporting, retention, and the economics underneath. The ones that stall are missing at least three of them.

This playbook documents all seven, in the order you build them. It is written for the agency operator who already knows how to write a sequence and now needs the machine around it — the repeatable system that lets you onboard a client in a day, run twenty accounts without losing reputation, and renew at month three instead of explaining a dip.

> **The month-three cliff**
> Cold email agencies lose most clients between day 75 and day 95 — right when the honeymoon ends and the client starts asking "what am I actually paying for?" Every system in this playbook is built to answer that question before it gets asked.

The seven systems

1. **Onboarding** — the 1-day intake that captures everything before any infrastructure gets built.
2. **Infrastructure** — domains, mailboxes, and isolation per client, set up once and never touched again.
3. **Sending** — the volume, rotation, and ramp rules that keep twenty accounts healthy at once.
4. **Inbox management** — triage, routing, and SLAs so replies never rot in a shared inbox.
5. **Reporting** — the weekly client report that makes renewal automatic.
6. **Retention** — the month-three save, the QBR, and the upsell path.
7. **Economics** — the unit math that tells you whether a client is worth keeping.

SYSTEM 01 · ONBOARDING

The 1-day client onboarding.

Slow onboarding is the first thing a new client notices and the first reason they doubt the decision. The goal is simple: everything you need to launch, captured on day one, in a form you never have to chase.

The intake — capture all of this before you touch infrastructure

- **ICP definition.** Titles, company size, industry, geography, and the disqualifiers. Without disqualifiers you will burn the list.
- **Offer + proof.** The one-sentence offer, the case study, and the single metric the client wants to lead with.
- **Domains.** Which root domains they will let you register lookalikes against (e.g. `tryacme.com`, `getacme.com`). Never send from their primary.
- **Calendar / CRM destination.** Where a booked meeting or positive reply needs to land. Get the integration credentials on day one.
- **Brand guardrails.** Words they will not say, competitors they will not name, claims legal has banned.
- **Volume target.** Meetings/month goal — this back-solves the mailbox count (see System 03).

> **Onboarding artifact**
>
> Turn the intake into a one-page client brief that every operator on the account can read in 90 seconds. This single document is what lets you hand an account to a teammate without a meeting.

Set expectations on day one, in writing

1. **Warmup window.** Sends start at scale in week 3–4, not day 1. Say this before they ask on day 5.
2. **Reply ≠ meeting.** Define what you report on (positive replies, meetings booked) and what you do not (opens).
3. **Their job.** They show up to booked meetings and forward you outcomes. Outcome data is what makes the renewal report real.

SYSTEM 02 · INFRASTRUCTURE

One isolated stack per client.

The single biggest deliverability risk in agency cold email is shared infrastructure — when one client's blacklist event drags down another client's inbox placement. The fix is isolation, by client, by default.

On a shared-IP platform, every client you run sits in the same reputation pool as hundreds of strangers. One spammer on that pool, and your client's primary-inbox rate drops — through no fault of yours, and outside your control. For an agency, that is not a deliverability problem, it is a churn problem you cannot explain to the client.

LAYER	PER CLIENT	WHY IT MATTERS
Sending domains	2–4 lookalike domains	Spreads volume; one burned domain never sinks the account
Mailboxes	3 per domain	Caps per-mailbox volume in the safe zone
IPs	Dedicated, not shared	A stranger's spam can never touch this client's reputation
Infrastructure	Isolated per account	A blacklist on Client A is invisible to Client B

How SendKit handles this

Every plan runs on dedicated IPs and isolated infrastructure — there is no shared pool to opt out of. Each client workspace is reputation-sealed from every other, so a blacklist event on one account is structurally incapable of touching another. SPF/DKIM/DMARC auto-publish per mailbox at connect time.

The infrastructure build, once per client

1. Register 2–4 lookalike domains. Redirect each to the client's real site.
2. Stand up 3 mailboxes per domain. Authentication publishes automatically.
3. Start warmup immediately. Do not wait for the campaign to be written.
4. Confirm dedicated IPs are assigned and isolation is in place before any cold send.

SYSTEM 03 · SENDING

The volume math that keeps 20 accounts healthy.

The mistake that ends agencies is pushing volume per mailbox to hit a number. Reputation is per-mailbox. Scale comes from more mailboxes, never from more emails per mailbox.

Back-solving mailbox count from the meetings goal

Work backwards from the client's target, not forwards from your sending capacity. A worked example, using conservative cold-email benchmarks:

Goal	10 meetings / month
Reply → meeting rate	~30% of positive replies
Positive reply rate	~3% of delivered
Emails needed / month	~11,000 delivered
Safe volume / mailbox / day	~30 cold sends
Sending days / month	~22
Mailboxes required	~17 → round to 18 (6 domains × 3)

The cap that is not optional

Keep cold sends per mailbox in the 25–40/day band, full stop. The instinct to "just push 80 to hit the number" is exactly what triggers ESP throttling and ends accounts. If the math says you need more volume, the answer is more mailboxes, never more per mailbox.

Rotation and ramp rules

- **Rotate across all mailboxes** in the account so no single one spikes.
- **Ramp new mailboxes** in over the first 2 weeks of live sending — do not jump a warm mailbox straight to 40.
- **Match the ESP.** Sending into Outlook-heavy lists from a Google mailbox (or vice versa) costs placement. Segment the list by recipient ESP.
- **Auto-pause on degradation.** If bounce or complaint rate spikes, sending should stop automatically — before a human notices.

How SendKit handles this

Auto mailbox protection watches bounce and complaint rates per mailbox and pauses sending before damage spreads. ESP matching segments your list by recipient provider automatically, and unlimited mailboxes on every plan means scaling volume never means scaling per-mailbox risk.

SYSTEM 04 · INBOX MANAGEMENT

Replies are the product. Treat them that way.

A booked meeting is the deliverable. Everything between "positive reply" and "meeting on the calendar" is where agencies quietly lose the value they generated. A reply that sits unanswered for six hours is a meeting you already lost.

Triage every reply into one of five buckets

BUCKET	SLA	ACTION
Positive — wants a meeting	< 1 hour	Send calendar link; log to client CRM
Soft — interested, not now	< 4 hours	Tag for nurture; set a follow-up date
Question / objection	< 2 hours	Answer; route to client if out of scope
Referral — "talk to X"	< 4 hours	New thread to X; credit the referrer
Negative / unsubscribe	Immediate	Suppress globally; never contact again

The shared-inbox failure mode

When all client replies land in one Gmail tab, two things happen: replies rot past their SLA, and you cannot prove to a client what came in. Both are silent churn. Reply management has to be per-client, tagged, and measurable.

How SendKit handles this

A unified inbox pulls every reply across every mailbox into one view, AI reply tagging auto-sorts responses by intent the moment they arrive, and a built-in dialer lets an operator call a hot lead without leaving the platform. Positive replies push to the client's CRM automatically.

SYSTEM 05 · REPORTING

The report that makes renewal automatic.

A client does not renew because the campaign worked. They renew because they can see it worked, on a schedule, without asking. The weekly report is not admin overhead — it is the single highest-leverage retention asset you have.

What goes in the weekly client report

1. **Outcomes first.** Meetings booked and positive replies this week vs. last. This is the only number that renews a contract — lead with it.
2. **Pipeline value.** If outcome data is flowing back, attach an estimated pipeline number to the meetings.
3. **Deliverability health.** Inbox placement rate, bounce rate, blacklist status — proof the engine is healthy, not just busy.
4. **Volume + coverage.** Emails sent, accounts contacted, where you are against the monthly target.
5. **Next week.** One sentence on what changes — a new segment, a tested subject line, a sequence tweak.

> **How SendKit handles this**
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> White-label, custom-branded reports on the Agency plan put your logo on the client-facing report, not ours. Inbox placement, reply rate, bounce distribution, and ESP performance are measured live per workspace — the report builds itself from real send data instead of a manual screenshot at 11pm.

Cadence

- **Weekly** — the automated report above. Same day, same time, every week.
- **Monthly** — a 20-minute call walking the trend, not the week.
- **Quarterly** — the QBR (see System 06), where you reset the goal and pitch the upsell.

SYSTEM 06 · RETENTION

Surviving month three.

Acquisition gets the client. Retention builds the agency. The month-three save, the QBR, and the upsell path are what turn a 3-month logo into a 3-year one — and the LTV math only works if you keep them.

The month-three save

Around day 75 the client's perception shifts from "exciting new channel" to "recurring line item." Get ahead of it. In the week-10 report, explicitly connect the cumulative results to the cost: "Across the engagement, X meetings at $Y blended cost per meeting — versus your $Z target CPA." You are pre-answering the renewal question while the answer is still in your favor.

The quarterly business review

- **Reset the goal.** Last quarter's target vs. actual, next quarter's target.
- **Show the compounding.** Deliverability and reply data improve as accounts mature. Make the trend line visible.
- **Pitch the next thing.** A second ICP, a new geography, more domains. The upsell lives here, framed as growth not cost.

> **The retention flywheel**
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> Clean onboarding → isolated infrastructure that never has a mystery dip → SLA-managed replies → a weekly report that proves outcomes → a QBR that resets the goal. Each system feeds the next. Miss one and the flywheel stalls at month three.

SYSTEM 07 · ECONOMICS

The unit math underneath.

Every system above costs time and infrastructure. This is how you tell whether a client is worth running — and how you price so the agency keeps margin as it scales.

Per-client cost stack

COST	DRIVER	NOTE
Domains	2–4 per client	One-time + annual renewal
Infrastructure / mailboxes	~18 mailboxes	Your platform cost, per client
Lead data	List volume	Sourcing + verification
Operator time	Onboarding + weekly ops	The real cost — protect it with systems

Why isolation changes the economics

On a shared platform, one client's blacklist event creates support time across your whole book — diagnosing dips that are not your fault. Isolated infrastructure means a problem on one account stays on one account, so your operator time scales with client count instead of exploding with it.

The three numbers that decide if a client stays

1. **Gross margin per client.** Retainer minus the cost stack above. If onboarding ate the first month, you need months 2+ to be clean — which is what the systems buy you.
2. **Operator hours per client per week.** Trending down is the goal. Systems, not heroics, get you there.
3. **Months to payback.** Acquisition cost ÷ monthly margin. This is why month three matters: most clients have not paid back yet when they hit the cliff.

The whole system, in one line

Onboard in a day, isolate every client's infrastructure, cap volume per mailbox, manage replies to an SLA, report outcomes weekly, save the client at month three — and the unit economics finally work. Skip the systems and you are buying clients you cannot keep.