# THE ART OF CUSTOMER ACQUISITION

Growbots

**CONTENTS**

CHAPTER 1

# FOREWORD

by Greg Pietruszynski,
CEO, Growbots

*It has been over two years since my co-founder Luke and I decided to change the way people generate leads through outbound sales. It all started in the coffee shop of a climbing facility in an old cheese factory. We started by testing out our new theory of targeted outbound sales, and it worked. Better than we could have expected actually but implementation proved difficult. Executing this strategy successfully involved a lot of tedious hard work. So we went hunting for an automation tool which could make this process scalable. When none presented itself, we decided to build one ourselves, and that was the start of Growbots.*

*From that first day running off caffeine and free wifi through the present, our objective has remained the same: to unlock entrepreneurial potential all over the world. We firmly believe that outbound sales is the best way to tell the world about your innovative product/service/solution. Yet, plenty of people are still struggling to get decent results from outbound sales, even if they have an excellent product.*

*We want companies to be able to focus on expansion, not sales. I realize that this is a tall order for most but we have developed a formula for building a predictable and scalable growth channel. One that we want to share with you now. Most of the information currently out there is either out of date or does not cover the whole process of generating new business. This guide is designed to fill those gaps with the latest best practices that we use.*

*We started doing outbound as a lead generation agency in that coffee shop and have continued to hone our skills. Since we wrote our last ebook, we have quadrupled our conversion rate thanks to many experiments and data-backed research. We have grown 20% month over month only doing outbound. Imagine if you could add that kind of growth to your business.*

*We still work in the same building, but over 70 people now take up almost the entire floor above the coffee shop instead of jostling for a table downstairs. Of course, our success is predicated on more companies seeing the same kind of growth. For that reason, we think now is the right time to bring the rest of the world up to speed on how to be successful at outbound.*

*And don't just take our word for it. To date, our customers have created over 120,000 warm leads using our tool. They are supported by the insights collected from an active 10 person sales development team and an 8 person data-science team, constantly working to develop innovative and data-driven best practices for outbound sales.*

*What our customers have realized is that developing an outbound sales channel pays off in spades. After all, we went from giving zero to 500 demos a month, only in the space of a year. By one and a half years, we had gone from nothing to a 4 million dollar ARR. This is just the beginning and we continue to grow every month.*

*In fact, outbound sales is so predictable that we know that every time we contact 200 people with our software, we will get two customers out of it in one month. Our revenue is only limited by the number of prospects we generate and the same can be true for you. I hope you use this guide to make your outbound sales pipeline predictable and profitable.* "

**Greg Pietruszynski**
CEO, Growbots

CHAPTER 2

# INTRODUCTION

So what is this email outreach thing all the kids have been talking about? Find out why you should be building your automated outbound sales channel right now. Hint: your revenue will grow and become predictable.

## THIS EBOOK IS FOR ANYBODY WHO WANTS TO MAKE MORE HIGH-QUALITY MID-MARKET B2B DEALS USING TARGETED EMAIL OUTBOUND SALES.

For those of you who are just starting outbound sales, this book will provide you with all of the information you will need to create an outbound sales pipeline. If you have already started your outbound channel, this guide will provide you with tips to optimize your campaign to get the best results. The information in this guide has been created from the lessons we have learned from sending 80,000 cold email campaigns for which we have an average conversion rate of 5%.

Before we built Growbots, we were an outbound lead agency, striving to provide warm leads completely manually. We produced quality work but it was incredibly resource-intensive. We knew there had to be a better way to do it, that gave us better results with fewer man hours, so we started to look around the market for a solution that could do the job for us. We needed:

- Data quality of at least 90% to make sure we didn't waste time on dead leads or get too many bounces.
- An easier way to prospect so that we could target companies which matched our ideal customer profile.
- A way to take the leads we got and put them directly into our outbound campaigns, sent automatically so that we didn't have to spend time setting up a newly written campaign for each person.
- Recognition of the kinds of emails we had received so that we didn't have to sort through our inboxes looking for the positive replies people had sent us.

Despite an exhaustive search, we weren't able to find any single tool or tool stack that could do all of that for us. We wanted to focus on generating leads, not doing tedious and time consuming busy work. And with this in mind, we created Growbots to alleviate these pains that we felt as entrepreneurs and know other entrepreneurs feel too.

## TARGETED EMAIL OUTBOUND SALES IS A WAY OF SPEAKING DIRECTLY TO THE PEOPLE WHO WILL BENEFIT FROM AND DECIDE TO BUY YOUR PRODUCT.

Through an outbound campaign you can let your customers know that there is a solution to their problems, a solution they didn't know existed before. Additionally, you choose your customers so you can target the ones who are most valuable.

Email is a better medium for targeted outbound than anything else. For one thing, most decision makers manage their own email while putting a gatekeeper in charge of their other forms of communication. For another, it can be automated easily, making your operation predictable and scalable.

**In this book we:**

1. Describe how to use the Jobs to be Done framework to help you understand which customers to contact and how to sell to them
2. Help you find the right way to approach the decision maker
3. Create and run your campaign
4. Nurture your warm lead so it is ready to sell to
5. Help you optimize your campaign to get the best results possible

By the end of this guide, you will be ready to create your own outbound pipeline. Successful outbound isn't broad and uniform, it is targeted and personal. It provides your customers with value by speaking directly about solutions to the problems that they have. Opening this new lead generation pipeline will be the first step you take on the road to predictable revenue.

## I WANT TO ACT NOW!

Are you busy and want to start building your outbound campaign ASAP? You can skip straight to the end where we have outlined all of the important information and actionable instructions contained in this ebook in a handy cheat sheet. You can quickly glance through the info there and then get started immediately. If you have any questions or are unsure of the reason for doing something we suggest, we have put page numbers next to each piece of information so you can quickly jump to the right spot.

CHAPTER 3

# TARGETING YOUR CUSTOMERS

Do you know who your customer is? You should. Find out how to tell what really makes your customer tick and why it is a crucial part of your outbound strategy. Included in this chapter: actionable templates for job stories, ideal customer profiles, and buyer personas.

## IN THIS CHAPTER, YOU WILL LEARN HOW TO:

- Apply the Jobs to be Done framework to outbound sales
- Make a job story
- Build an ideal customer profile to make your job story actionable
- Build a buyer persona to apply your job story to your messaging

Share:

## *YOU NEED A TARGETING FRAMEWORK TO CREATE A TARGETED CAMPAIGN*

It goes without saying that targeted outbound should get you better conversion rates than from untargeted mass emailing (0.00001% if you were wondering) but it is not enough to have a vague notion of who you want to target. Over the last 26 months and 80 thousand cold email campaigns, we have honed our targeting, initially through trial and error and later through formal analysis of our customers.

Our conversion rates were low when we started, around 1%. To bump them up, we started testing criteria like the vertical, size, and location of the businesses that we reached out to. Our numbers started to improve. Still, we realized that our approach to targeting had been built in a haphazard fashion and decided to find out if we could get better results.

We decided to sit down and formally describe our customers, using ideal customer profiles and buyer personas built using the Jobs To Be Done framework. And I am happy to say **the conversion rate from our outbound campaigns went up to 7 percent based on targeting alone**. The benefits that we saw and that you can see from targeting don't stop at improved conversion rates either.

## BY TARGETING YOUR CAMPAIGN, YOUR IMPROVED CONVERSION RATES BECOME PREDICTABLE

This is because you are targeting a market segment which is responsive to your inquiries by design. Additionally, outbound leads are more valuable than inbound leads since you target the most valuable companies you can. This is according to David Skok, a board member for inbound evangelists Hubspot. If targeted outbound means you are converting more valuable leads in a predictable way, you will be getting predictably higher revenue coming from the other end of your pipeline.

One last thing to think about is the impact of your campaign. As John Barrows said at the SaaStr 2016, not only does targeted outbound lead to more qualified leads but it leaves your reputation intact. See, you may send a quick email blast to 1000 recipients in the same time it takes you to send 100 targeted emails and both might result in five conversions. The thing is, as John says, "you probably pissed off 995 people, that when you try to go back at them, they're going to be like, Yeah, take me off your list, you psycho." You get this poor reaction with the same number of conversions to show for it.

## THE JOBS TO BE DONE (OR JTBD) FRAMEWORK IS ESSENTIAL FOR TARGETING YOUR OUTBOUND CAMPAIGN

Remember when I said our conversion rate went from 1% to 2.5%? Well, you can attribute most of that jump to the fact that we adopted the Jobs To Be Done framework to target prospects and craft highly relevant messages for them. I'll give you a quick rundown of the theory of JTBD.

It has been published in the MIT Sloan Management Review and does something revolutionary. **Instead of thinking about the type of customer who might buy your product, you need to think about the conditions which cause a customer to buy your product.** Of course, a theory is only worth exploring if it can be made actionable.

> When applied to outbound, you can use JTBD to identify both **the situation where your solution helps the most and the outcome that your customers want from using it**. Armed with this information, you can predict which customers find themselves in a situation that you can fix and want the outcome that you provide. You can then target them as prospects and tailor the messaging in your campaign to how you can fix their situation. This will help you convince them that you can provide their desired outcomes.

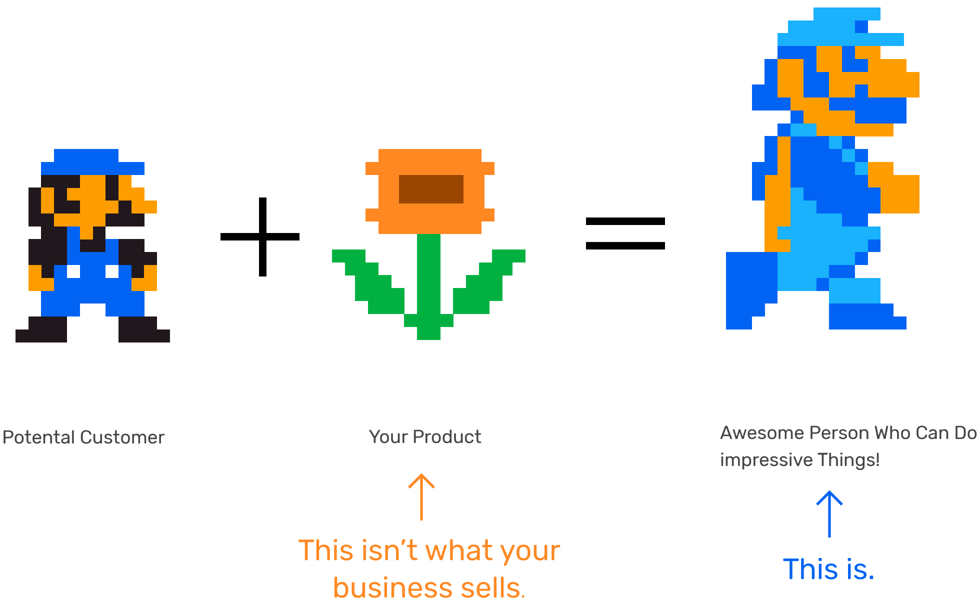
**Step 1:** Find out what job your customers hire your product to do
**Step 2:** Turn your research into a job story
**Step 3:** Find the information you need to build an ideal customer profile
**Step 4:** Match your ICP criteria to your job story
**Step 5:** Make your job story actionable for messaging by creating a buyer persona

### Step 1: Find out what job your customers hire your product to do

First, let me explain what I mean by the job that your customer hires you to do. Clayton M. Christensen, one of the authors of the study I mentioned above, gives a good explanation in this video about a fast food company trying to increase the sales of milkshakes. This approach applies equally to B2B.

Basically, **your customer hires your product to solve a problem that they have**. For instance, when a bank gives a construction company a loan, the product is money that the construction company can use in that moment. But don't be tricked into thinking that the job that your customers hire you to do is the main function of your product. The construction company is hiring the loan to provide them with a new piece of equipment, for instance.

There are few different things that can also do the job of getting the company the new piece of equipment. Aside from obviously getting a loan from a different bank or corporate entity, they could sell some assets or equity in the company. They could also lease the equipment. In all of these situations, that job to be done is the same, to get a new piece of equipment.




Sometimes it is not entirely clear what the job is that you do. For instance, Intercom mentions an example of one of their features. They had created a map of the world to display where users were engaging from. It became a very popular feature and they became curious as to why. It had been built to give their customers greater insights into how their customers' users were engaging with the company, so they thought that it was being used as a way to target information to a specific geographic customer base.

It turns out that was not the case. The map happened to look really flashy and companies found that in investment rounds, they could use the image of the map to show off how many users they had all over the world. What this meant is that Intercom started developing the map as a promotional tool rather than a way of delivering targeted insights.

The fact that the job to be done isn't always clear of course raises a big question. How can I find out what job my product does? After all, the Intercom example shows that the job that your product does can be completely different from what it was designed to do. Here are a few steps, adapted for the B2B environment, that I have taken from The Innovator's ToolKit, which will help you to figure out what jobs need to be done.

- **A. Look at your current customers**
- **B. Define your competition and analyze their customers**
- **C. Define the customers you want and analyze them**
- **D. Talk to everybody in the company who has contact with your customers**
- **E. Do interviews**

**A. Look at your current customers**

These are companies who have already proven to be willing to hire your product to do the jobs that they need to do. So they are the best places to start finding out what jobs you perform. For instance, to use the bank example from earlier, what kinds of businesses take out loans? What business plan do they use to justify the loan? If you're not a bank and your customers don't need to give that kind of information up front, interview them.

You can check out the interview methodology we use further down.

**B. Define your competition and analyze their customers**

As this great example of calculus textbooks in the education market shows, one of the main takeaways of the JTBD framework is that you aren't only competing with companies who make a similar product to the one that you sell. A good way to think about this comes from Alan Klemant in his book *When Coffee and Kale Compete*. **Ask yourself: whose profits are going to go down when mine go up? Those are your real competitors.**

Share:

> Klement gives the example of mainframe computers. There was a lot of press suggesting that the PC was going to sweep away the mainframe as a cheaper disruptive alternative. This has not been the case. The largest producer of mainframes (IBM) is still making nearly 100 billion dollars a year and recently sold off its PC business to concentrate on the high-end mainframe market. So who has been the real competitor of the mainframe that has emerged? Cloud computing platforms.

When you have established who your true competitors are, you can figure out what kind of jobs your competitor's customers hire them to do. For instance, if you make accounting software, you might compete with both accounting firms and other accounting software platforms. What you will find is that the customers of both services are hiring their product to take care of their accountancy issues effortlessly and without thinking too hard about it.

**C. Define the customers you want and analyze them**

This is similar to analyzing your competitors but instead, requires you to look at the customers you want. Analyze what jobs those customers would hire your product to do. So, if you want to raise your average deal size from 5 thousand to 15 thousand dollars, see what kinds of jobs those higher value customers want to be done.

For instance, if you make glass bottles, the job that you do for a less valuable customer will be to provide a container to deliver their beverage. However, a more valuable customer might want to hire you to do the job of providing a container to deliver their beverage without the worry of delivery delays.

**D. Talk to everybody in the company who has contact with your customers**

This can range from your sales team to customer success and complaints. Find out what kinds of things your customers say about your company and your product, both what they like and what they don't like. Additionally, look for other clues. Intercom explains that they found that their customers would often ask for a solution in the form of a feature request.

For instance, imagine your software, which provides your customer with SEO analysis, has the occasional bug. If you are able to handle it with proactive service, you might be doing the same job of providing seamless SEO information to the customer as a company providing perfectly running software with no service.

**E. Do interviews**

The easiest ones to get will be with your current customers but if you are able to snag interviews with competitors' customers or higher value customers, they can provide you with even more information. You can find interview subjects through LinkedIn or vertical specific sources like Angellist for tech startups. When you get them to sit down, start by asking these questions from the American Press Institute:

- How do you make money?
- What are the things about running your business that keep you up at night?
- What are some things ("jobs") that you are having problems getting done?
- Under what circumstances do you usually try to do these things?
- What do you currently use to help you?
- What other options have you considered?
- Why did you use or reject these?
- How would you describe the perfect solution?
- What are the most important characteristics of this solution?

You can ask these basic questions to start understanding the jobs your customer needs to be done. If you want to go deeper, you can check out this set of interview questions tailored for SaaS products that are also applicable to other B2B applications.

Along with providing some good general interview tips (remind the customer that they can't hurt your feelings, lets the customers do the talking, etc.), it also helps you think about how your product (SaaS or otherwise) can be compared to other products and the jobs that they do.

### Step 2: Turn your research into a job story

A job story is the simplest way to express your job to be done. You can use this simple format that we have taken from Alan Klement:

**When (situation), I want to (motivation), so I can (expected outcome)**

"**When**" refers to the conditions that cause a customer to hire your product, "**I want to**" refers to the action your customer wants to take, while "**so I can**" describes the outcome your customer wants. So let's put this into practice. Say you are a company that makes graphic design software and have done an interview with a customer, you might get some answers like this:

> I sell precision metal parts for the telecommunications and automotive industry. I'm kept up at night by how many changes need to be made in a short time between the design phase and delivery. I'm currently having problems delivering clear designs to my machining department. These designs are usually sent out from engineering at the last minute after undergoing a number of redesigns. We currently use Solidworks but have considered Autocad.
>
> Ultimately we rejected Autocad because it was much harder for our engineering team to collaborate using the software. A perfect solution would be one where the whole team could easily change the design quickly and then send

it to engineering where it would work perfectly.

Using the information from the interview, we can create this job story:

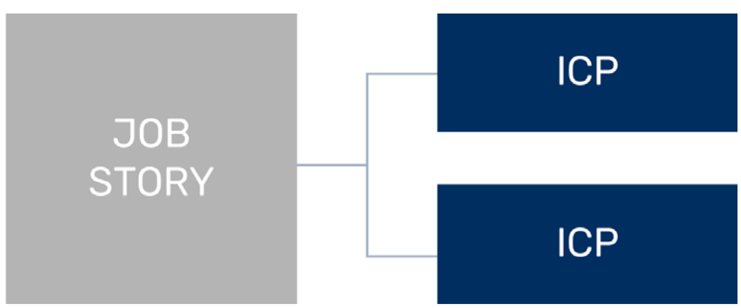
> *When I design a project, I want to be able to make collaborative changes easily, so I can deliver the completed design according to schedule.*

Here are some more examples:

> *When I get a new building project, I want to be able to buy new equipment, so that I can expand my operations.*

> *When I need to pitch to investors, I want to be able to visualize the international reach of my customer base, so that I can convince them of my international growth potential.*

As you can see, the job to be done can be boiled down into a simple statement. It is up to you to now take the framework and apply it to targeting your outbound campaign.



### Step 3: Find the information you need to build an ideal customer profile

Now you need to take the information in your job story and make it actionable for prospecting. This means that you need to take your statement and use it to create a set of criteria you can use to select prospects. This set of criteria is also known as an ideal customer profile.

Using Steli Efti's definition, and ideal customer profile or ICP is:

> Basically a description of a fictitious organization (company, government agency, non-profit organization...) which gets significant value from using your product/service, and also provides significant value to your company.

Put into practice, it is a list of criteria which describes the kind of customer that you want to sell to or essentially a highly targeted market segment. Since Wendell R. Smith first argued for the importance of market segmentation, it has been widely accepted that focusing on a market segment produces better results for each segment targeted or as Dr. Smith saw, "Success in planning marketing activities requires precise utilization of [...] market segmentation as components of marketing strategy."

Think of it this way, we would all love to see every company in the world as a potential customer. The problem is that you only have a limited number of resources to convert new customers. Therefore, you should use them where they can give you the best return. This means picking out the companies who are most likely to benefit your company.

So once you have done your research and created your job stories, ask these questions (taken once again from Steli Efti) of the information you have gathered to create your job story:

1. **What verticals work best for you?**
   Often certain industries require certain Jobs To Be Done. For instance, the financial sector has to address regulatory concerns that are not found in the retail sector. Does your product work for one or many different industries? If you find it is many, products often offer different use cases for different industries. What are the different use cases for your product?

2. **What size companies are most responsive to your product?**
   Is your product suitable for small business or large enterprises? How big a team does your customer need to use your product? For instance, if you sell a solution for a minimum of 100 users, you probably shouldn't target small businesses.

3. **Do your customers tend to cluster in certain locations?**
   You might find that you have a lot of success with a vertical which is concentrated in a certain area. Also look at your capabilities. Can you only provide support locally or internationally? Which languages do your users speak and which do you support?

4. **What technologies do your customers use?**
   This is a question that all technology providers should ask. Companies often look for solutions that integrate with their current software. For instance, we switched CRMs simply

because the new CRM integrated with the rest of the software we used. It can also be useful to target companies using your competitor's products since that means they have a problem you can solve.

5. **How long have your customers been around?**
   Newer companies are often more receptive to disruptive technologies than older ones. That said, more established companies might have nagging issues that have existed for a while and need solving.

6. **What reporting structure and departments does the company have?**
   You may find that you have better luck selling to companies where there is a flat reporting structure as opposed to a rigid hierarchy.

7. **What special conditions are there for your product?**
   These could be anything else. For instance, maybe you only sell to window cleaning companies, Chinese restaurants, or sales teams with more than ten people.

8. **What red flags appear with customers who don't buy your product?**
   Red flags are exceptions to any of the findings that you have made earlier. For instance, you may be able to sell to small and large businesses everywhere in the world except France where you only have success selling to medium sized businesses.

While you think of the answers to these questions don't forget this fact. **The value of a customer is not simply the amount of money they give you at the end of the transaction.** It is so much more than that. Lincoln

Murphy points out that you can and should choose your customer.

Think about it. You would rather have a valuable customer who requires minimal support than a customer who makes small deals but requires a ton of support. After all your customer is doing a job for you and your needs can be put into a job story as well:

> *When I want to increase my sales velocity, I want a customer who does not have a long purchasing process, so I can close the sale quickly.*

Or

> *When I want to improve my conversion rate, I want a customer who has a high Alexa score, so that they will need more users fielding questions on their website.*

When picking your customers, here are a few important qualities that Lincoln Murphy suggests you consider:

- The likelihood that they will buy what you are selling
- The value of the deal
- The number of resources you will need to commit to close the deal
- How responsive you need them to be once they have bought your product or service
- How many resources you will need to commit once the customer has purchased your product
- How influential the customer is, either to evangelize for your product or hurt your reputation if they are unsatisfied

### Step 4: Match your ICP criteria to your job story

Now the first section of your job story, your "**when**" represents a pain point for your prospects. This is a situation they would like to alleviate to make a process run more smoothly (what they "**want to**" do) so they can get the outcome they want. If your solution is a good fit, you will provide them with the "**want to**" (solution) and the "**I can**" (result).

Targeted prospecting means you need to find the companies that have a "**when**" happen to them that you can solve. To do this, look at the criteria you have assembled and figure out what criteria those companies share.

For instance, let's think about a book printer. They have created the following job story for their customers:

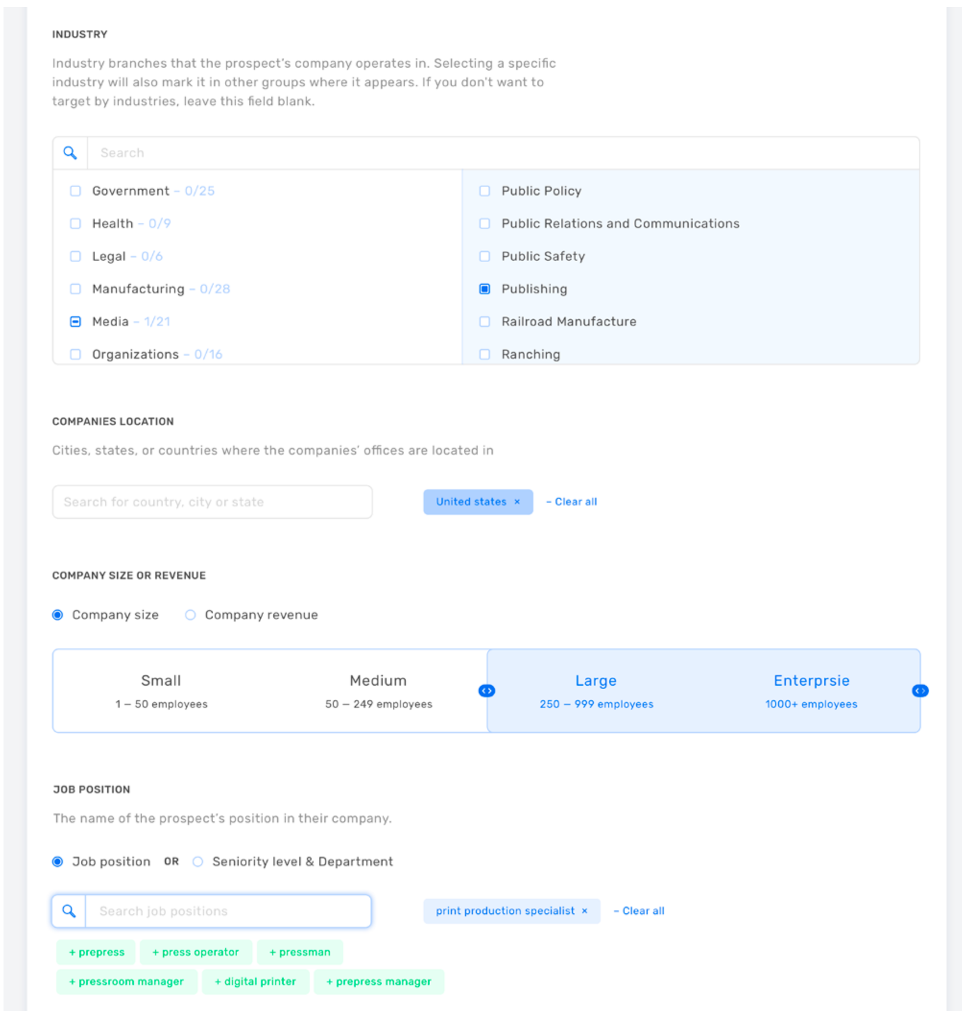
> *When I need to publish a mass market book in the United States, I want to be able to print it in both a hardcover and mass market paperback format, so that I can make it as widely available as possible.*

At the same time, they have created a job story for the job they want their customers to do for them.

> *When I need to find new customers, I want customers who will make multiple printings of one edition, so that I can always produce at full capacity.*

So armed with this knowledge, the have gone ahead and built an ICP which covers their ideal customer:

> **Vertical:** Publishing
> **Location:** The United States
> **Size:** More than 100 employees
> **Special conditions:** Mass market
> **Red flags:** Academic publishers, special editions




While not all of this information is in the job story, the research that our printer has done identified academic publishers and publishers looking to produce special editions as not doing the job they hire their customers to do, namely go for multiple printings of a single edition. This doesn't mean that they can't sell to academic publishers, they certainly can, but it is best that our printer go after their best possible customers before selling to customers who don't necessarily fit their ICP.

Or you could look at a marketing automator who has created the following job story:

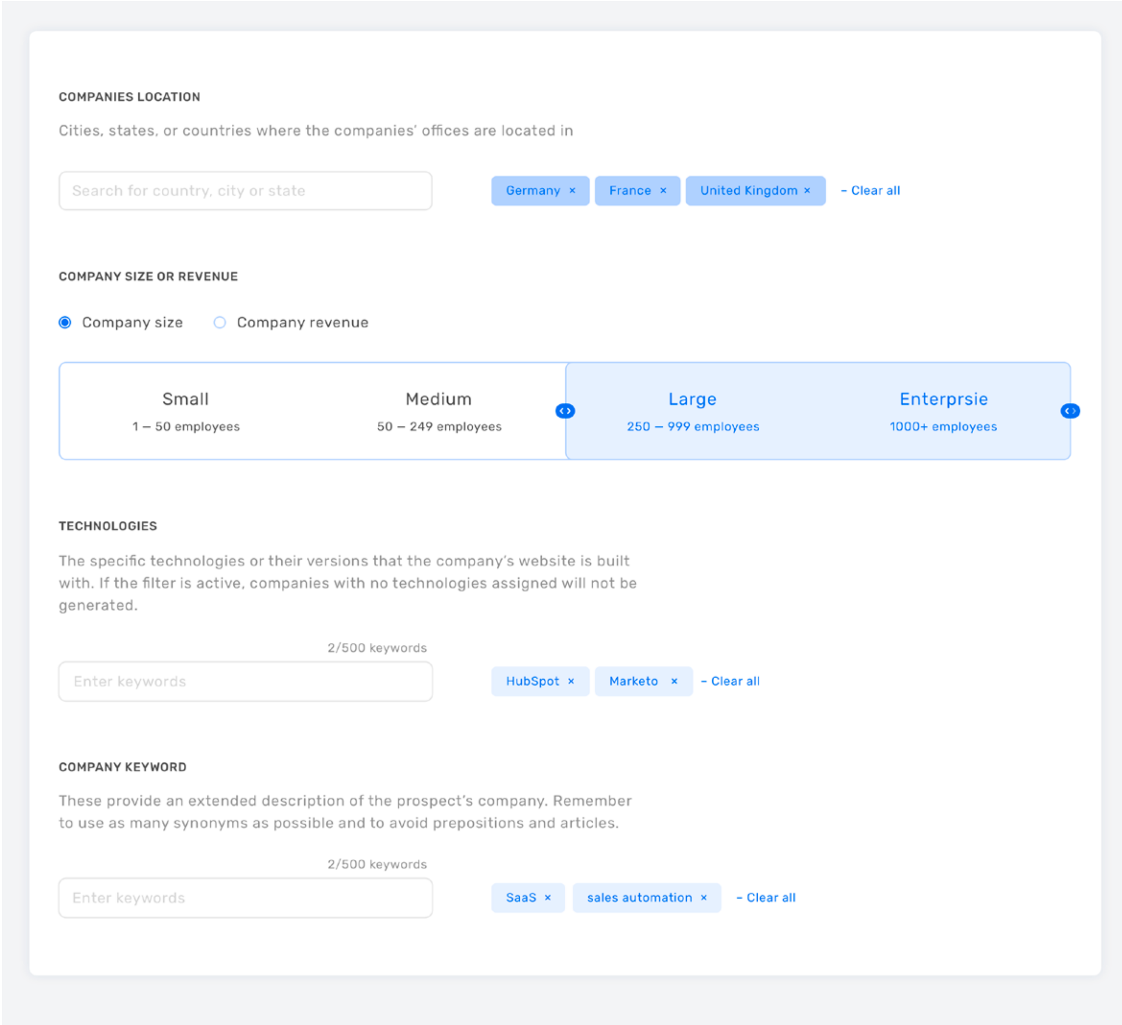
> *When I need to optimize my inbound pipeline, I want to clearly track my leads through the pipeline while keeping an eye on my metrics, so that I can convert more leads.*

And the following job story for what they want their customers to do:

> *When I need to scale my revenues, I want to take on new customers who I can provide service to through my European customer success team and that have a similar way of doing business to us, so that I can lower my churn rate.*

Has this ICP:

> **Company keywords:** SaaS, sales automation
> **Technologies:** Marketing automation (Hubspot, Marketo)
> **Special conditions:** Must do inbound marketing, up to 5 users (limit of the tool), must speak English, French, or German
> **Location:** UK, France, Germany




Once you have your ICP ready, you can use the criteria it provides to start targeting customers. Put the criteria directly into your prospecting tool, like the one that Growbots provides. If one of the criteria on the list doesn't match your ICP, put in the information that you can and then qualify your prospects before starting your campaign.

### Step 5: Make your job story actionable for messaging by creating a buyer persona

If your ICP is a list of criteria that match the kind of company you want to target, your buyer persona is a list of specific pain points and motivations of the person you write your message to, along with the jobs that you do for them. Why is that important? As Intercom's Matt Hodges explains, "You are going to have different personas that are going to hire your product for a job, but they're going to talk about it in a different way." Even though B2B sales is between companies, the communication between those companies are between people and should be treated as such.

A CEO might have different pain points and desired results than a customer success specialist but depending on your approach, you will need to convince each of them that your product benefits them personally. To do this, your persona takes the information from your job story and applies it to the person you are writing your message to. You can then take that information and put it into the campaigns that you send to prospects matching those personas.

The information you need to build your buyer persona comes from the same process of researching your job story. Try interviewing end users and members of the c-suite, in addition to decision makers you have sold to. This will help you understand the individual job stories of each recipient.

To demonstrate how to build a persona from a job story, let's look at the example of a company selling automation software like Zapier. Specifically, we are looking at a cold email campaign for customers who need to automate their customer support software stack.

We have made a job story for each prospect starting with the end user, that we have used to build their buyer persona. In addition to the information in the job story, we have included more information that we took from our research:

*When I receive a support request, it needs to be automatically sent to all our tools, so that I can act on it without wasting time on tedious admin.*

> **Title:** Customer success specialist, customer hero, customer service representative
> **What value we deliver for them:** They don't have to enter data into individual applications
> **What objections they have:** Don't want to go through a time-consuming implementation process
> **How do your features perform the jobs they need to be done:** It's easy to automate tedious tasks, interface is easy to navigate cutting down on time needed to set up tasks.

And now the decision maker:

*When we receive a support request, it needs to be logged and my team needs to be notified across our entire tool stack, so that I never have to worry about a support request going unanswered.*

> **Title:** VP of customer success, head of customer service, customer service director
> **What value we deliver for them:** They can automate their team's processes, can ensure no requests get dropped
> **What objections they have:** don't want difficult onboarding, don't want any lag between integrations
> **How do your features perform the jobs they need to be done:** 750 integrations including their full support stack, full support means that there is no downtime.

And now the c-suite:

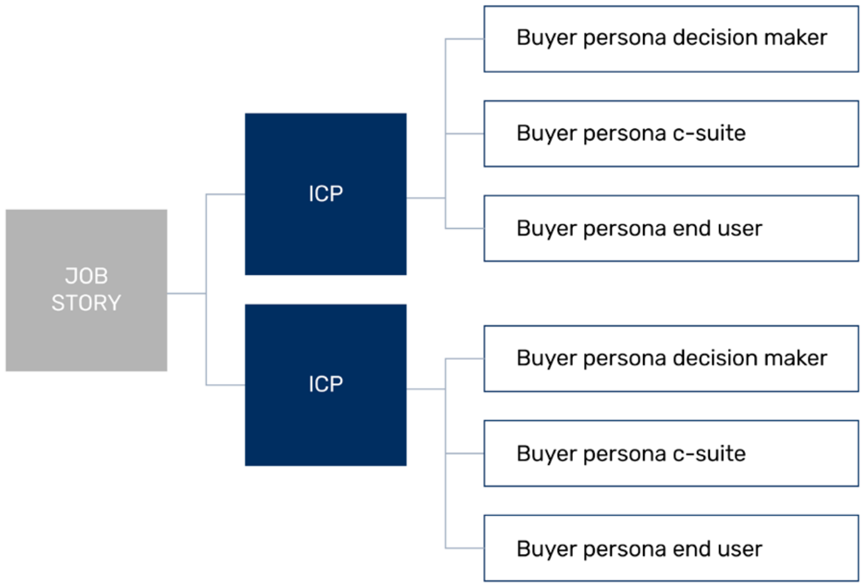
*When we receive a support request, it needs to be acted on immediately and cost effectively, so that we can maintain our customers' loyalty.*

> **Title:** CEO, COO, CTO
> **What value we deliver for them:** They can build their software stack organically, in an integrated manner, works across every team in the company
> **What objections they have:** Needs to be cost effective, can't drop any integrations
> **How do your features perform the jobs they need to be done:** Team pricing plan, 750 integrations including all software used by the company

Like with your ICP, buyer personas can include other criteria that you find to be important. You can check this article by Referral SaaSquatch to see what else you can add.

### Step 6: Start targeting

Once you have your job stories, ICPs, and buyer personas completed you are ready to start targeting prospects.




With each layer of segmentation, you improve your conversion rates while at the same time collecting more information for your emails. Once you have the specific buyer persona matched to the specific recipient within a company which matches your ICP, you can personalize most of your campaign from that document.
For instance we can use the persona for the decision maker above to create this cold email:

New Message

Subject: {{ John }} x Mark

Hi {{ John }},

Quick question for a {{ VP of Customer Success }} -
How do you integrate your customer feedback reporting tools at {{ Boardly }}?

I'm asking because we have created software which seamlessly integrates your entire tool stack - you'll never drop another service request from a customer.

Will you or somebody from your team be able to find 15min this week to see the platform in action?

Send

All you need is the name of the prospect and the name of the company and you can create a personalized message that speaks to that prospect's needs. This means you only need some basic research to personalize your messages rather than having to construct each campaign from the ground up using new research.

In the next chapter, we go over the different approaches you can take.

## FAQs

### Can I make more than one job story to target my customers?

Yes. In fact, the sections of the job story are also modular. For instance, you might find that at one pain point your customers need multiple jobs done to get multiple outcomes. For instance,

| ***When I...*** | ***I want to...*** | ***So I can...*** |
| --- | --- | --- |
| double the size of my sales team, | integrate my tool stack, be able to visualize performance, pinpoint poor performers in real time | work smoothly between multiple platforms, coach my team to keep them meeting their KPIs. |

### Should I only reach out to companies who match my ICP perfectly?

Your ICP is useful for targeting the best fits for your company. Keep using it as long as you get good prospects. If you want to improve your conversion rate or go after larger deal sizes, make adjustments to the criteria in your ICP and then test them to see which gives you a better result.

### Should I only have one ICP?

You can start with one but an ICP should be targeted. If you have a new group of customers who have a similar profile, that is radically different from your current ICP, it is useful to make a new ICP. Also when you want to target a new type of customer, it is worth building a new ICP that you can test.

CHAPTER 4

# FIND THE BEST WAY TO APPROACH YOUR PROSPECT

You know who you're looking for. Now go out and find them. **Included in this chapter:** three approaches you can use to influence your target decision maker and actionable instructions for generating targeted prospects in Growbots.

## IN THIS CHAPTER, YOU WILL LEARN HOW TO:

- Use the information from your job story to decide who to contact.
- Modify your targeting to approach your target from the most effective angle.

## FIND THE BEST WAY TO APPROACH YOUR PROSPECT

Let me set you up with a problem; you want to convert your prospect but you don't know who to talk to. In most organizations, there is rarely one person involved in the buying decision. The Google/Millward Brown Digital, B2B Path to Purchase Study from 2014 found that while in 64% of B2B purchases, the c-suite have the final say on a purchasing decision, 24% of the non c-suite have final say, and 80% of the non c-suite have an influence on the decision.

Share:

This means that to find and convert the decision maker, you need to decide who their influencers are. By pitching to everybody involved in the purchasing process, you have a better chance of converting.

**Step 1:** Decide who you want to convince
**Step 2:** Generate prospects
**Step 3:** Match your approach to your prospect
**Step 4:** Use advanced targeting to get a closer match to your ideal customer

### Step 1: Decide who you want to convince

You get the best results when you target the decision-making process rather than just the decision maker. As Aaron Ross says in his seminal work *Predictable Revenue*, decision makers often rely on their teams and other influencers in the company to help them make purchase decisions. This means that in addition to decision makers, you should target other people in the company who could influence the decision.

Your ultimate goal is to convert the decision maker. To do this, experiment with different approaches in different verticals. Some decision makers might respond better when referred by their boss, while others do when subordinates get excited about a product. Still others react when they are pitched directly.

A good place to start is with the pain point described in your job story. Figure out who is responsible for alleviating that pain point. Take this “when” statement:

“When I need to increase the number of qualified candidates for managerial positions,”

Since you are talking about job candidates this would probably be handled by people with job titles like: HR, Chief Happiness Officer, Chief Human Resources Officer, VP of HR and Vice President of People among others.

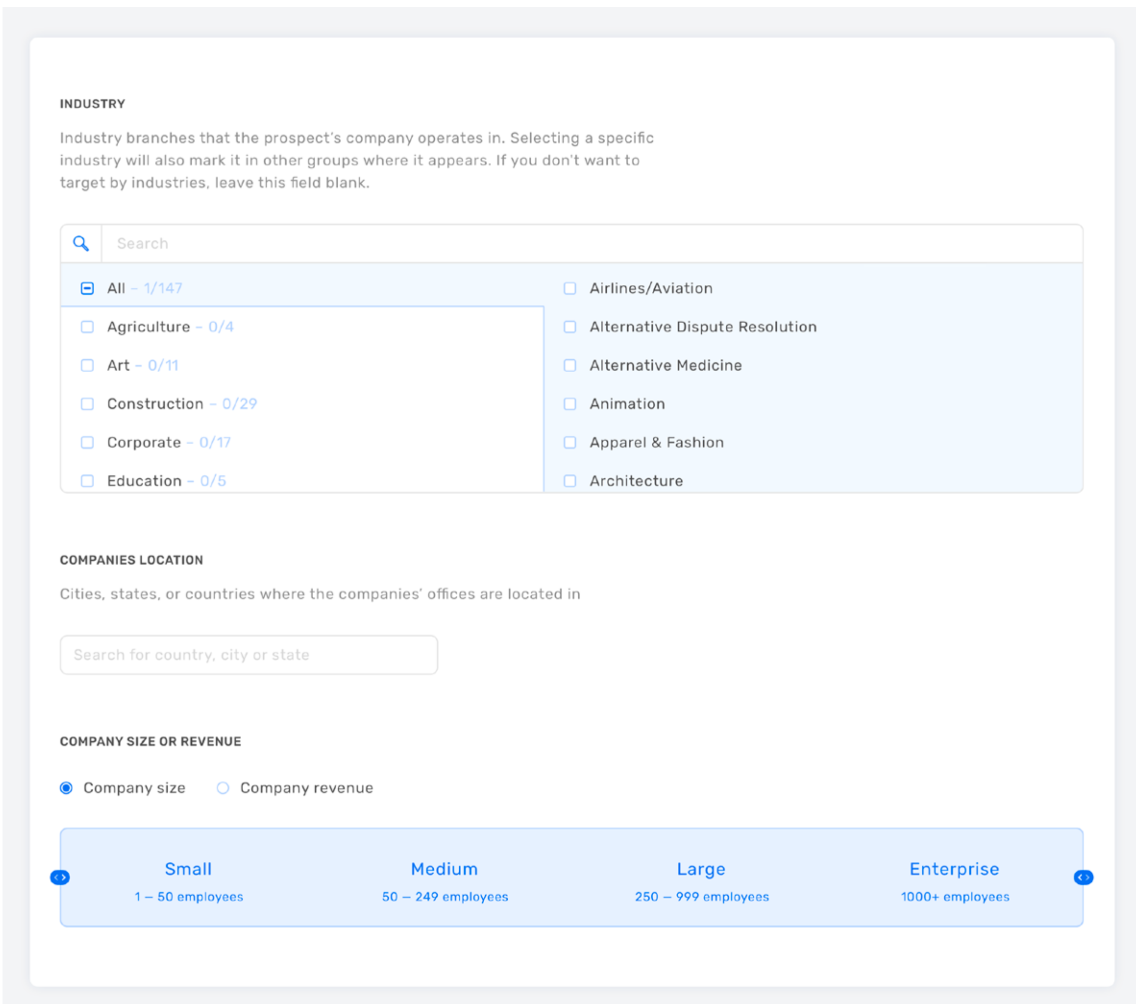
Working under them you will find people with job titles like: Recruiter, Job Posting Specialist, Human Resources Specialist, Recruitment, and Social Media Coordinator.
Working above them would be people with titles like: CEO, COO, and

Head of Operations.

You can find a comprehensive list of job titles here which you can match to the pain point in your job story. Different job titles will come in handy depending on the approach you take.

## Step 2: Generate prospects

Remember all of that work that you put into your ICP? It is about to bear fruit. Have a look at the Growbots search tool.

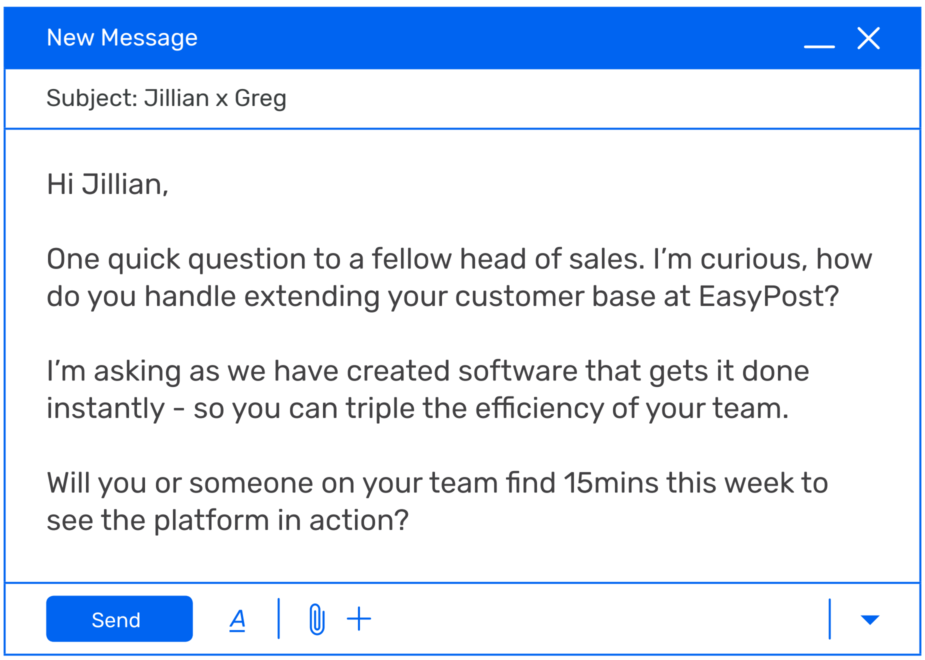



## Step 3: Match your approach to your prospect

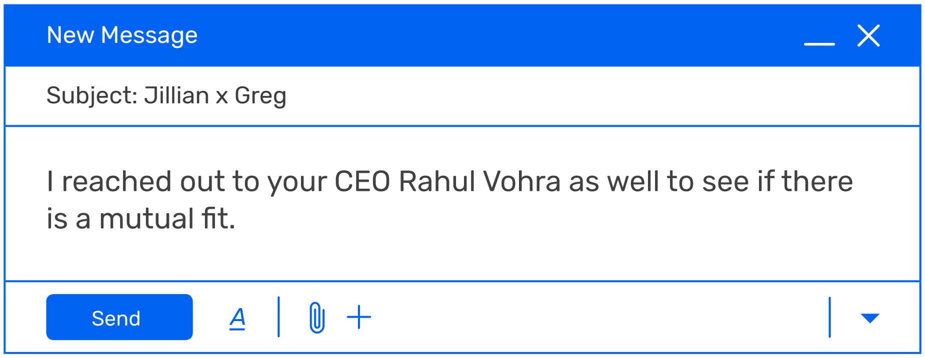
At this point, you are going to be searching not just for a company that matches your ICP but a specific person to contact. So now is a great time to plan how you are going to approach your prospect. There are a few ways you can go about this and you should always be testing your approach.

## DIRECT APPROACH

The most basic approach is what Growbots excels at, targeting the decision maker.




The beauty of this approach is that you can remove all of the barriers between you and the person who you want to buy your product. No other cold outbound method can guarantee that level of direct access. One addition you can add comes from Syed Asad, CEO of HustleX. Just add a line like this to your message:



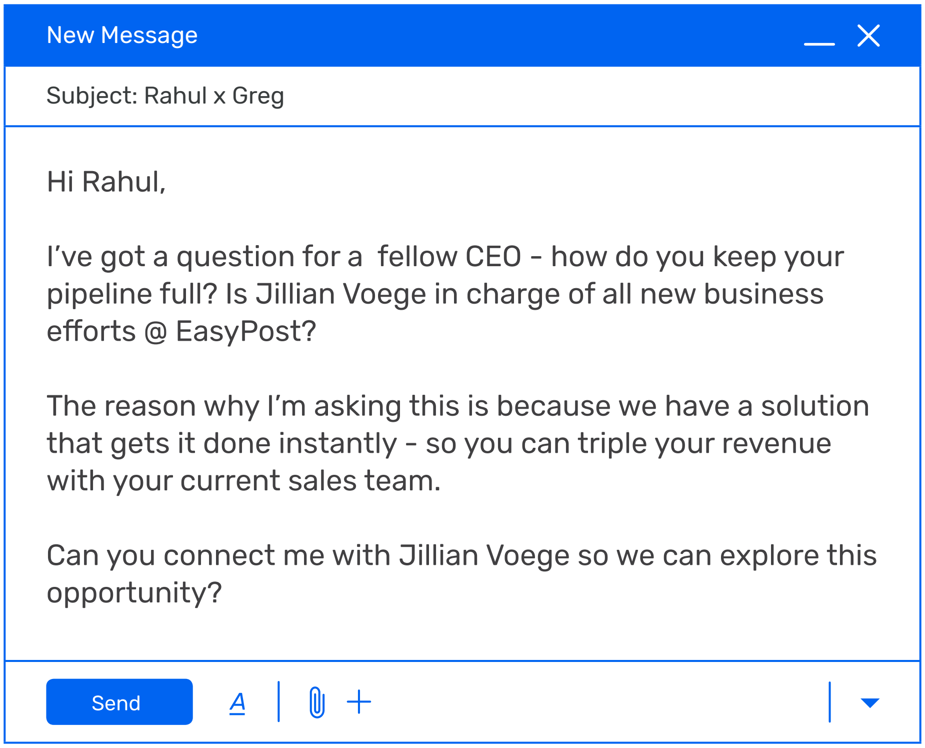

Syed finds that this is a trigger that almost always works. “Heads of departments don’t want to look bad in front their CEO and that gets them to reply to the email.” Instead, they do their due diligence for their CEO and reach out to you to learn about your product. You have got your warm lead.

Sounds pretty great, huh? Well, take a minute before choosing your target. It is important to make sure they are the right person.

For instance, back when we were a lead agency, we used to market to the people who were responsible for generating leads in a given company. That position was obvious in some companies but not as much in others. The responsibility for leads could just as easily be placed in the hands of the head of sales as the head of marketing or business development manager.

Now it was easy to find out who that was when only one of those positions existed on the org chart. It became a lot harder when some or all of those positions were found in the company. So what do you do when you’re in that situation? Well, luckily there are a few other approaches that you can take.

## TOP DOWN APPROACH


New Message

Subject: Rahul x Greg

Hi Rahul,

I've got a question for a  fellow CEO - how do you keep your pipeline full? Is Jillian Voege in charge of all new business efforts @ EasyPost?

The reason why I'm asking this is because we have a solution that gets it done instantly - so you can triple your revenue with your current sales team.

Can you connect me with Jillian Voege so we can explore this opportunity?

Send

The first is the top-down referral approach. **This approach involves reaching out from one CEO to another to offer up your services.** Now the CEO probably isn't in charge of the buying decision but they are a powerful ally to have. Syed says it like this, "You contact the person at the top as it puts pressure on the guy below him (your target)."

Imagine you are the head of the marketing department and your CEO comes and asks you about a new marketing automation product that was pitched to her. She really thinks it can help grow the business. It would look really bad if you didn't follow up on a recommendation from your CEO. That said, ask yourself one question: Is my message something that a CEO would care about? CEOs tend to care about sales but may be less interested in which video conferencing software their company uses. In these cases, use the top-down approach to target somebody above the decision maker who would understand the value of your product.

## BOTTOM UP APPROACH

> New Message
>
> Subject: Alexis x Greg
>
> Hi Alexis,
>
> I wanted to contact your sales manager, but I thought that you, as an SDR, are a better point of contact regarding this:
>
> Alexis, how do you hit your targets every month? I'm asking this because we found a way of connecting you with all of your potential customers instantly, so you can focus on qualifying leads. With our solution, you'll hit your targets effortlessly.
>
> Would you or your team lead be available for a quick 16-minute call this week to explore this opportunity?
>
> Send

The next approach is the bottom-up referral. Oftentimes, the person who decides if a company should buy a product is not the one who will actually be using the product. That said, the decision maker will usually listen to input from the end users. After all, these are the guys who have hands on experience with generating value.

The bottom-up approach targets these users. If you can convince enough of these guys and gals that you will provide them with value, **they can act as product champions for you to the people who make the buying decisions in the company**. Get them to ping their managers to let them try out the product. They often have enough sway to push their managers to sign up for a trial.

Max Altschuler, CEO of Sales Hacker, and author of essential business development primer Hacking Sales, says it like this, “ If you can do a good job at turning these reps into your buying champions, the odds are that you’ll have the full attention of the right decision maker in no time.”

## COMBINE THE APPROACHES TO GET YOUR BEST RESULTS

There are a couple ways to combine your targeting approaches. Currently, we have found it most effective to target decision makers, but with a little addition at the end, a sentence politely requests that if our content is not directly relevant to you, could you please pass this information onto the right decision maker. Your goal is of course still to target the specific person who holds sway over purchasing your product. This way you cover all bases so that in the off chance that you targeted the wrong person, you can still convert from that message.

For companies large enough to have end users, decision, makers, and executives filing separate roles in the buying process, Syed has what is called the three musketeers approach where you use each approach simultaneously to target executives, decision makers, and end users. With the CEO referring a product to them while their employees ask for it, the decision maker is more likely to reach out to you. “Using the three musketeers approach, my team converts 30% of their cold prospects into demos/sales calls.”

## MAKE THE MESSAGE TO YOUR RECIPIENT PERSONAL

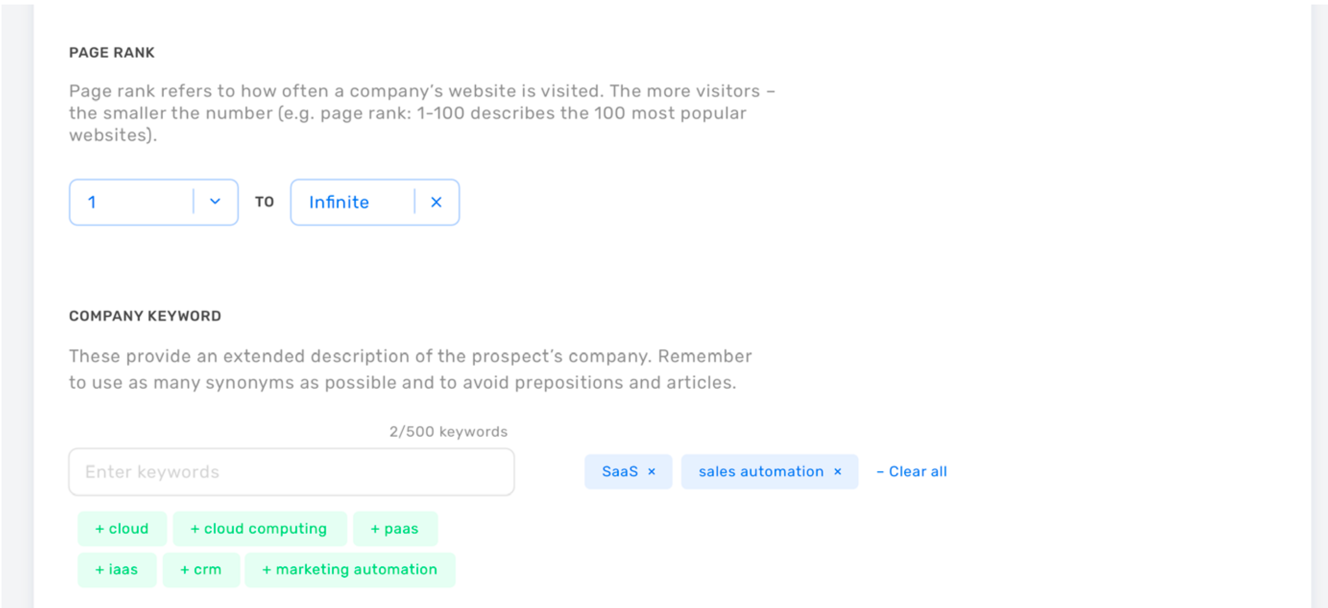
Remember how I described how easy it is to go from prospecting to sending your message? That is by design. But here comes the rub. Not every campaign will work with every recipient. In fact, **you should be devoting just as much attention to crafting your campaign as you have already put into choosing your prospects**.

> *Just a quick aside here. I have been throwing around this word "campaign" and I wanted to make sure you all know what I am talking about. A campaign is the messages you send to your prospect, the sequence they are sent in, and the way that you time their delivery. Campaigns are pre-prepared so that they can be activated as soon as you generate prospects. In the next chapter, I'll explain exactly how you put one together.*

For now, I want to stress how important it is to personalize your message. The first step towards personalization is to create a separate campaign for each approach you use with a certain ideal customer profile. Think about it. Would a message resonate in the same way for a CEO as it would for a sales manager? When you have generated a prospect in Growbots, it is easy to pick which one of your campaigns targets that person closest.

### Step 4: Use advanced targeting to get a closer match to your ideal customer

Your ICP and buyer persona might require you to pinpoint your prospect's position. For instance, if you are selling marketing software, the VP of marketing or a marketing manager are good people to talk to using the direct approach or a CEO using the top-down approach. Beyond that, you can whittle down your criteria even more by adding even more targeted keywords like *digital* to your marketing manager search to find digital marketing managers.




Once all of that information has been imputted, hit save project and presto! You now have a targeted list of people who already fit a lot of your target criteria. At this point, you can put this list into a campaign and start it off. This process can take as little as five minutes from the time you input the search criteria to the time your first emails are sent out. Not too shabby.

That said, you are going to get better results the more you target. Along with the prospect's name and position, you get some information about the company they work for and a link to that company's website. Before you spend a credit on a prospect's contact information, take a closer look at them.

You can research any news about this company, for instance, whether they have undergone any changes which you could capitalize on. **This is also the time to check your negative criteria.** If you find any red flags, don't hesitate to move on to the next prospect, or to generate more prospects.

Once you have your prospects ready, it is time to write your campaign.

### FAQs

**If I want to target a decision maker, should I reach out to C-level decision makers or senior managers?**
That really depends on the size of the company. We have found that if the company has 50 employees or fewer, the C-suite is where decisions are made.

For instance, if you are selling marketing automation software, you should target the VP of marketing or chief marketing officer. For companies with over 50 employees, jobs become more specialized. For those companies, it is best to target a marketing manager, or even a regional marketing manager if it is a really big company. In Growbots, you can search for companies by their size so that you can target the right decision maker in the organization.

**Should I target companies which use specific software products?**
This is a technique that works particularly well for technology providers (no surprises there). There are two ways you can use software in your targeting. The first is to find companies that use complementary software.

For instance, let's say you sell marketing automation software. You will probably have better luck selling to customers who already see the value of automation. So you can target customers who use sales automation products. A bolder approach is to search for companies which use your competitors' products. They have already shown that they need a product that does what your product does. You can target them and convince them yours is better.

A word of caution: this works best when your software integrates specifically with the target software. It will narrow your search unnecessarily if you limit it to companies using a piece of software unrelated to your own.

### Should I narrow down my search using specific keywords?

Using specific keywords can be useful if the given criteria you have doesn't fit your ICP perfectly. For example, in Growbots there is no vertical for window cleaning companies. If you want to target them, you will need to put "window cleaners" into the Companies advanced keywords field. There is an art to designing a search. Depending on how well your results fit your ICP, it can be better to use a custom combination of advanced search options in Growbots.

### What should I do if the search criteria I use don't lead me to generate many leads?

Avoid adding extra criteria like keywords or technologies. Finding the right balance requires some experimentation before you get it right.

CHAPTER 5

# WRITING YOUR CAMPAIGN

This is where the magic happens. Find out how to take all of those customer insights that you collected and turn them into outbound gold. **Included in this chapter:** actionable instructions for crafting your perfect campaign.

## IN THIS CHAPTER, YOU WILL LEARN HOW TO:

- Write the first email of your campaign
- Write your follow-ups using the short approach and the long approach
- Time the sending of your emails for the best results

## WRITING YOUR CAMPAIGN

We are already here. You have a clear list of super targeted prospects that you are ready to reach out to. So what's next? It's time to write your campaign. But before you even start thinking about your messaging, **let's discuss what the goal of your outbound campaign is in the first place**.

Easy, you say. It's to close deals and generate revenue. Next question.

Not so fast. If that is your answer, you are about to be very disappointed. What you have done is try to skip to the end of your sales pipeline without thinking about what got you there. You will have plenty of time later to close deals and generate revenue. Right now you have one very simple objective. **Spark enough interest in your prospect that they will want to talk to you again.** Does that sound like small potatoes? It is, but that's the strength of the process.

> *Even a simple noncommittal message of "tell me more" is a win for you. At that point, you have their attention. When you have their attention, you can start giving them details about your product and really start selling.*

So now that you know your objective, let's get onto achieving it. In this chapter, we are going to look at the different elements of your campaign and how to craft them to get the optimal result.

All of the techniques and tips suggested in this chapter come from the organic process of tweaking our own outbound campaigns to achieve the best results. They come often from simple, informal A/B tests that we have staged as we create better outbound campaigns. The most important thing to look at is the cumulative effect of applying these methods to your outbound campaign: A **10 percent conversion rate from cold emails!**

The goal of your outbound campaign is to give your prospect every opportunity to respond to your message. You see, somebody may be interested in what you have to say after the first message (or first few), but for whatever reason won't end up responding. They also may be on the fence and need a bit more information before deciding what response to make or they just got caught up in their own work and forgot. It is your job to craft a series of messages that create a personal bond with your prospect and show your value, without turning them off to what you have to say.

**The 8 steps to crafting your outbound campaign:**
**Step 1:** Write the subject line of the first email.
**Step 2:** Write the first paragraph of the first email.
**Step 3:** Write the second paragraph of the first email.
**Step 4:** Write the call to action of the first email.
**Step 5:** Write the footer of the first email.
**Step 6:** Write the P.S. of the first email.

**Step 7:** Write your three follow-ups (short, long, short).
**Step 8:** Write a new thread for prospects who didn’t respond to the first thread (long, short, long).

☞ **Take out the persona you are using to target:**
Throughout the process of creating your campaign, write to your persona like they are a real person. It really helps you get in the right mindset to create something which is personalized rather than a stiff impersonal sales pitch.

So, let’s look at the first message. This is the first point of contact you will have with your prospect. It is probably the most important message in your campaign (it accounts for 50% of all positive replys) so we are going to look at it in closer detail than the other elements present. In this message, you want to develop a personal connection with them while at the same time pitching your company. Check out how we have done that in this example.

## THE FIRST EMAIL OF THE CAMPAIGN

New Message

Subject: Bart x Greg

Hi Bart,

| | |
|---|---|
| One quick question for a fellow CEO - since I checked out your team lineup and couldn't find anyone responsible for lead generation. I'm curious, how do you handle extending your customer base at Readz? | First paragraph |
| I'm asking because we have found a way of connecting you with all of your potential customers, filling up your sales funnel almost instantly. | Second paragraph |
| Could you or someone on your team find 15min this week to see the platform in action? | Call to action |
| Greg<br>CEO & Founder at Growbots<br>calendly.com/growbotseu/demo <- Book a time with us! :) | Footer |
| PS. Here is a nice infographic explaining what we do <link> | P.S. |

Send

So, let's now break this email down and see what makes it work.

### Step 1: Create your subject line

Share:

It all starts here. The first thing your prospect sees in their inbox. Chadwick Martin Bailey say "64 percent of people say they open an email because of the subject line." But at the same time, a Litmus-Fluent study found that 42 percent looked at the sender first before opening. So how do you act on the data in those studies? Let's look at the subject line of our email.

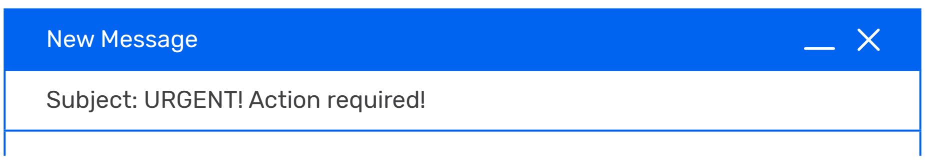

Notice how it is so simple? We find that writing the email subject as "your recipient's first name" x "your first name," (you can include last names in a formal campaign) or your recipient's first name with you company's name, does the job of drawing the sender into the subject line. We came upon this method after whittling our subject lines to their bare essences. And this works the best, giving us an 80% open rate.

In fact, an Adestra report said that subject lines with 2 words or less had a 53.7% chance of being opened. Now there are two important points to take away from what looks like a very simple formula.

1. **Use the recipient's name**
   The same Adestra report said that personalized subject lines are 22.2% more likely to be opened.

This is one of the first areas that you can use automation to add a personal touch. By adding a custom field to your subject line, the name of your recipient will automatically be added. This means you don't have to go through each individual message and add their name. Pretty nifty, eh? Well, get ready. There is more to come.

2. **Don't be deceptive**
   Wouldn't you be confused and annoyed if you saw an email subject line that says this:




and turns out to be about a cloud service provider?

All a deceptive subject line can get you is high open rates. Do those translate into a high warm lead rate? Quite the opposite. Use common sense. If you opened an email thinking it was from an old high school friend only to find that it was a pitch for a cloud data service, what would you do? Would you have any interest in doing anything except reporting the message as SPAM? I didn't think so.

Just take the advice that has been parroted to confused teenagers for years and be yourself. Say exactly who you are and what your intentions are.

3. **These techniques have been overused and don't work anymore. Best avoided.**

**Riddles**

New Message

Subject: Do you know how many sales people are not reaching their quota?

**"Quick question"**

New Message

Subject: Quick Question.

**Sounding like a marketer or another newsletter**

New Message

Subject: Sales conversation derailed? These 4 simple words get it back on track.

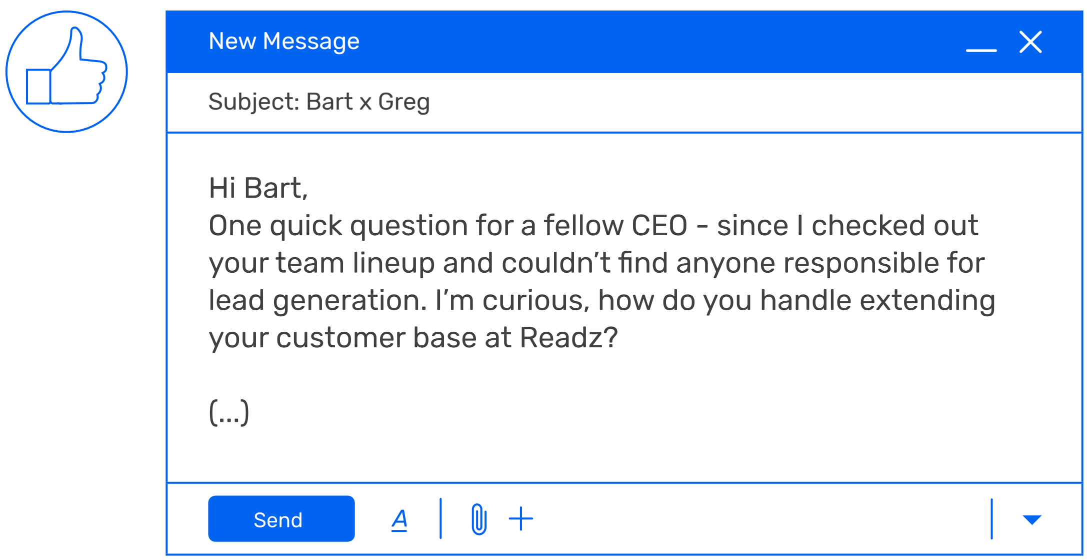
## Step 2: Write the first Paragraph of your message

Share:

Are you ready to make a killer first impression? Great. It only takes three seconds. Let's make it a good one. The first paragraph of the first message in your campaign is the most important piece of content you create in your campaign. According to a study in the journal *Nature Neuroscience*, your brain forms first impressions based on value. Therefore, your first paragraph **needs to create value by speaking directly to your prospect as an individual**. That way they will develop a connection with you and your message, and see the value in what you propose. This is a great place to use custom fields to include research that makes the message personal.

So, what goes here? Paragraph is probably the wrong word. A simple sentence or sentence and a half which establishes a rapport with your recipient should be more than enough. **You want to reach out to the person and win their trust.** You can do this using an icebreaker of some kind, maybe a reference to something that the two of you have in common.

So, let's check out our first paragraph,




If you have a customer with whom you should use formal language, it might look like this, New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

I saw your keynote at the FP&A Innovation summit last April about the importance of cyber security in the financial sector. Could you tell me how you handle the verification process at Nationwide Bank, for your internet customers?

(...)

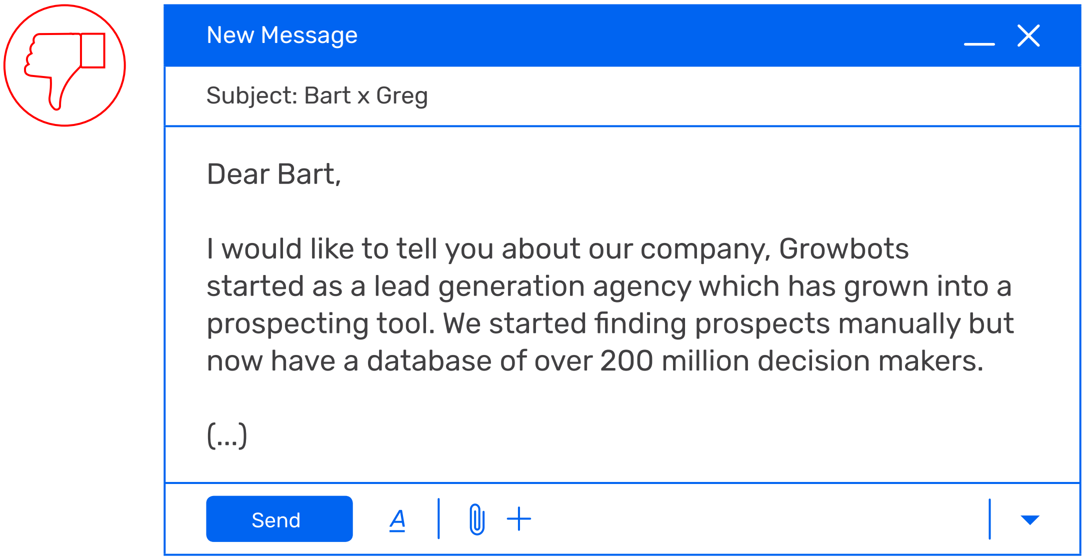
Send

**Write something interesting**

Think that goes without saying? You would be surprised. Often marketers will put all of their efforts into tweaking their wording while completely ignoring the content of the message. If your messaging is boring, it doesn't matter how much you optimize it, it won't work.

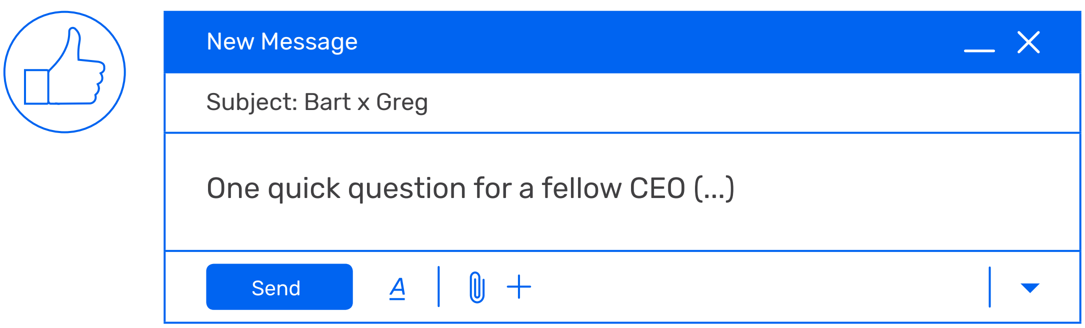
For instance, the examples above are interesting to the reader. They immediately talk about reader and their work.

While this one takes a while to get going, just talks, about features, and will bore the reader.

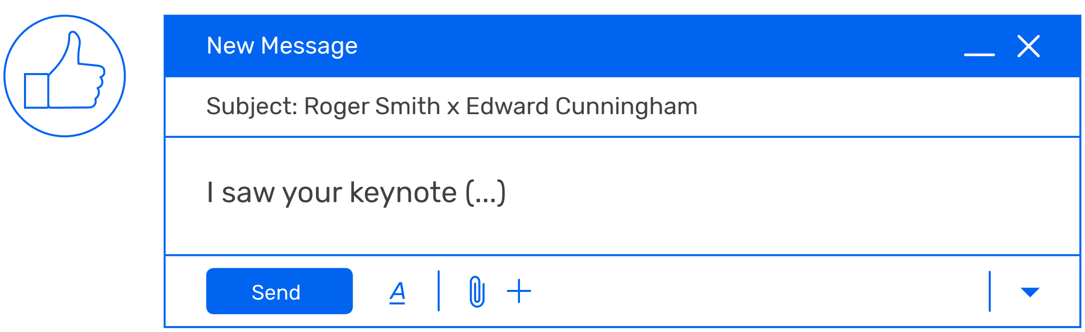



If you dissect the elements of this paragraph, a few main points come across.

- **The message finds common ground with your prospect**

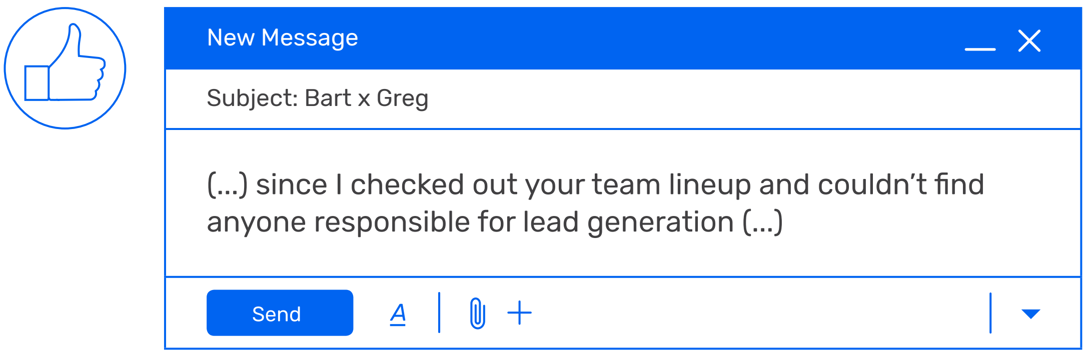



or

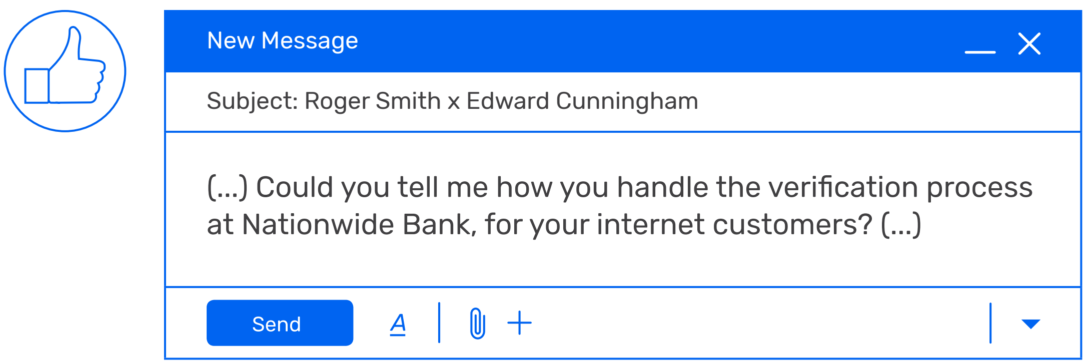


In addition to topics of interest to the recipient, try to find something that connects the two of you. Maybe you were both at the same conference or worked in the same area. Common ground can help you develop an emotional connection.

- **It is relevant to the recipient**



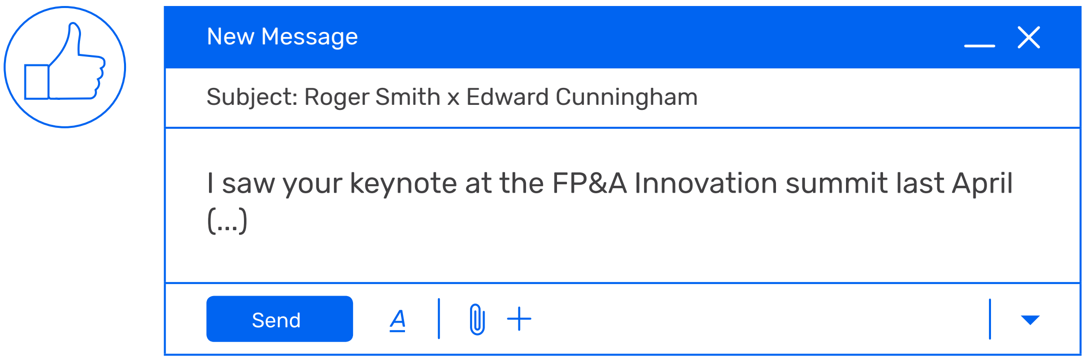

or



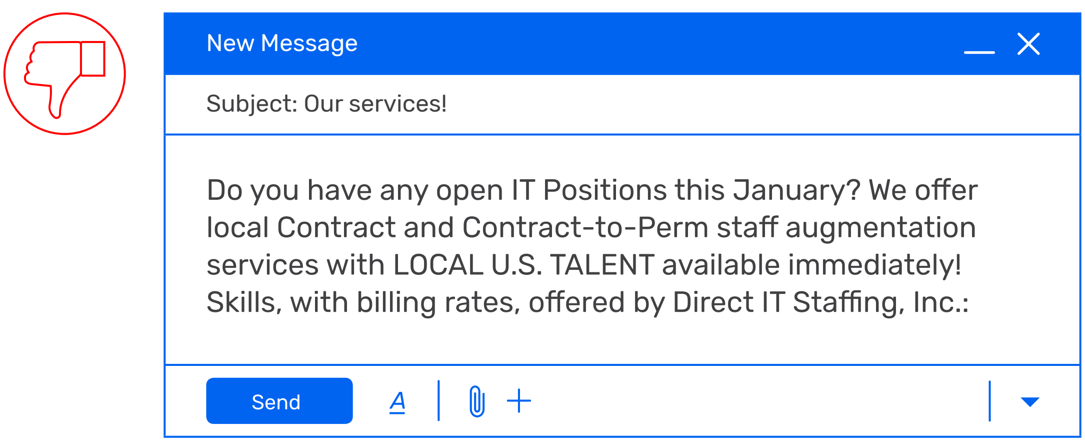

**Nothing in this first paragraph should suggest that the message you have sent could be equally useful when sent to another person.** For instance, don't talk about the way that your product helps all tech companies in general, talk about how it can help your recipient's tech company.

Another approach is to include information that you have found out about your prospect.


or




Check out what happens when the information in the text is irrelevant to the recipient. This message was sent to our CEO instead of our CPO.




It wouldn't be useful for a CEO, would it?

- **It is personalized within the first paragraph**

New Message

Subject: Bart x Greg

(...) since I checked out your team lineup after your keynote at SaaStr (...)

Send

or

New Message

Subject: Roger Smith x Edward Cunningham

I saw your keynote at the FP&A Innovation summit last April about the importance of cyber security in the financial sector. (...)

Send

Remember you have a very small window to catch your recipient's attention. The more the message appears to be directed at the recipient, the more likely they are to keep reading.
You can also do this when you are asking for a referral.

New Message

Subject: Bart x Greg

I've got a question for a fellow CEO - how do you keep your pipeline full? Is Dana, your biz dev director, in charge of all new business efforts @ Wide Eyes?

Send

You can see what happens when you send a message that is so generic, it could be sent to anybody.

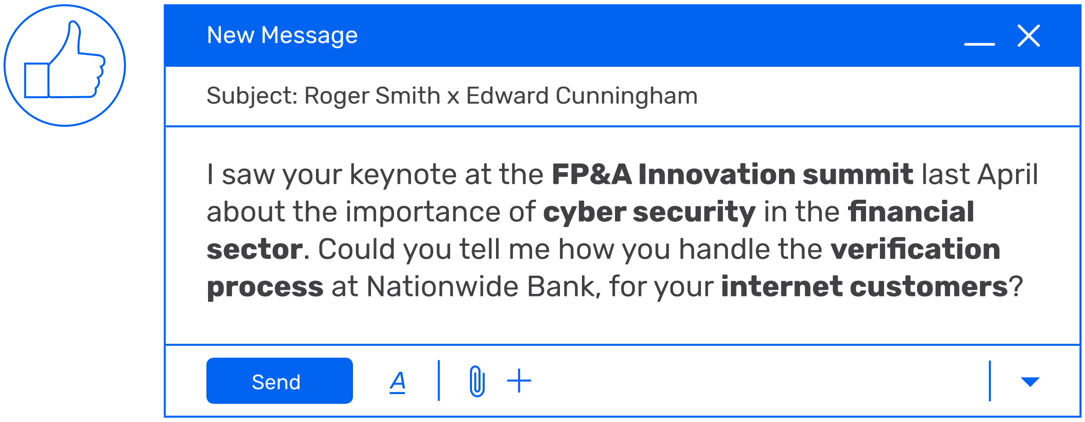
> New Message
>
> Subject: Software development experts
>
> We help companies with their custom software development needs. Our expertise lies in building software for web & mobile using technologies like Java, .NET, Ruby on Rails etc. (...)
>
> Send

Most people would find it difficult to relate to that message.

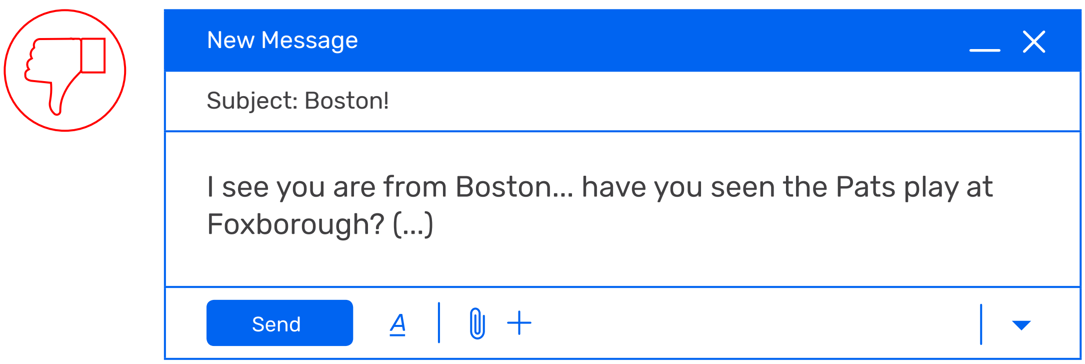
- **The content comes from a business context**

> New Message
>
> Subject: Bart x Greg
>
> One quick question for a **fellow CEO** - since I checked out your **team lineup** and couldn't find anyone responsible for **lead generation**. I'm curious, how do you handle **extending your customer base** at Readz?
>
> Send

or




You aren't trying to bond over your shared love of cycling or rom coms. You are trying to stir up some empathy when it comes to the common successes and frustrations you both feel on your journey towards business success. Now see what happens when you don't personalize in a business context.




You waste time, space, and the attention span of your prospect with irrelevant small talk.

- **Personalization for Pros**

The first paragraph is where personalization can really shine. Not only will it help you give a great first impression, but personal elements in your first paragraph are also visible in the preview of the message. Take a look at these examples:

- Personalized message

New Message

Subject: Mark x Greg

Hey {{ Mark }},

I've got a question for a fellow {{ CEO }} - how do you keep your pipeline full? Is {{ Amber, your biz dev director, }} in charge of all new business efforts @ {{ Hypernym }}?

The reason why I'm asking this is because we have a solution that gets it done instantly - so it could be beneficial for us to connect.

Can you or someone on your team jump on a quick 16-minute call this week to explore?

Send

or

New Message

Subject: Roger Smith x Edward Cunningham

Dear {{ Roger }},

I {{ saw your keynote at the FP&A Innovation summit last April about the importance of cyber security in the financial sector }}. Could you tell me how you handle the verification process at {{ Nationwide Bank }}, for your internet customers?

The reason why I'm asking is we have developed a system that is incredibly secure without hassling your customers with excessive verification procedures.

Could you spare 10 min this week so that I can show you how we can help {{ Nationwide }}'s customers? How about {{Friday at either 10 or 11 AM }} GMT?

Send

- Generic Message

> New Message
>
> Subject: Any lead generation needs?
>
> Dear Sir,
>
> I would like to speak with you about lead generation. If you're not the best contact for this, can you direct me to the person in charge of sales or marketing?
>
> Our solution combines calls, emails, Linkedin, and automation to make targeted and timely touchpoints.
> Sales teams use our service to find and contact potential clients, generate interest and set up introductory meetings.
>
> You could cut down on time spent on prospecting, and focus on making more sales instead.
> Please contact me to learn more -- let's set up a call to discuss soon.
>
> Lucy Moriarty
>
> Send

If you have been paying attention to anything I have said so far, you should know that the key to outbound success is providing a personalized message.

*By doing this kind of advanced personalization, we boosted our outbound conversion rate from 7 percent to 10 percent.*

At the same time, outbound will only be effective if you can scale up the rate at which you are able to contact people. So how do you make automated messages personal?

- This is where your research comes into play. Once you have the name of your prospect, you can find out more about them.
- Always use personal information rather than company information. People tend to care more about their needs.
- Automate adding research to your campaigns in Growbots. This is where our custom field feature shines. When you have generated your list of prospects, export them into a spreadsheet. When you have done your research, you can add the custom text to a new column. Then import the spreadsheet back into Growbots. Your research will go directly into the messages sent to your prospects, garnering you much better results. For instance, this sentence is in the example:

*Is {{ Amber, your biz dev director, }} in charge of all new business efforts @ {{ Hypernym }}?*

The text between the braces is what is called a custom field. While the rest of the text stays the same for each message, the information in the custom field can be changed to include custom personal information. That is why we are able to add the sentence about Amber at Hypernym, based on our research. That sentence makes the message personal, only relevant to Mark.

## A COUPLE THINGS TO REMEMBER

1 **Prospects can see the beginning of your first paragraph in the preview.**

Here is a good example:

**Greg Pietruszynski** **John x Greg** Hey John, I've got a question to a fellow CEO - how do you **10/28/16**

See how it speaks straight to them as a CEO? The Litmus-Fluent study we cited earlier states that 24% of people look at the preview first when deciding whether to open the email. This is a good opportunity to show some of your research. This could be about a topic that is important to the recipient. A first paragraph which shows the research you have done about the recipient will grab people in the preview.

Now check out how a generic first paragraph can hurt your message:

**Mark Woods** **Private Eyes, Inc. Introduction** Hi Greg, I am with Private Eyes, a **10/28/16**

This just looks like an ad and not a personal message.

2 **Don't start with an obnoxious or boarding declaration**

Saying "Hi, I'm..." is a wasted opportunity to get your recipient to take notice of your message. Instead get straight into what you can offer them.

**Still don't know how to start your first sentence?**

Just finish one of these sentences:

- Quick question for a fellow… (sales expert, CEO, professional, American…)
- I saw you … (at the Revenue Summit, were tweeting about)
- We are both … (in the startup world, members of SalesHacker LinkedIn group)

### Step 3: Write the second Paragraph

Now that the pleasantries are over, it's time to make your pitch. This is all about the value that you can give the customer and the benefits that you provide for them. It is not about the feature that you offer. Check out our message's second paragraph along with a formal example:

New Message

Subject: Bart x Greg

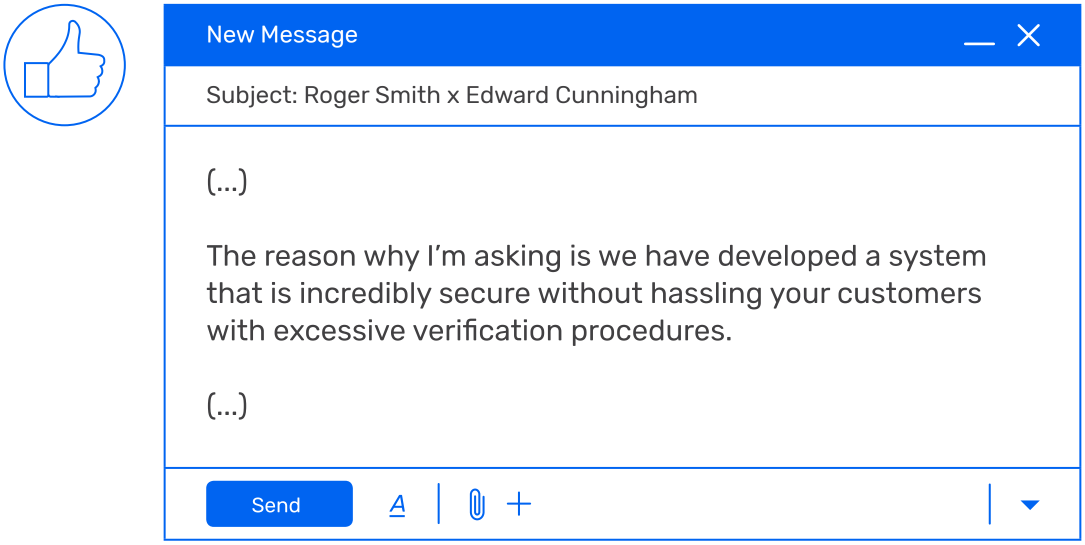
(…)

I'm asking because we have found a way of connecting you with all of your potential customers, filling up your sales funnel almost instantly.

(…)

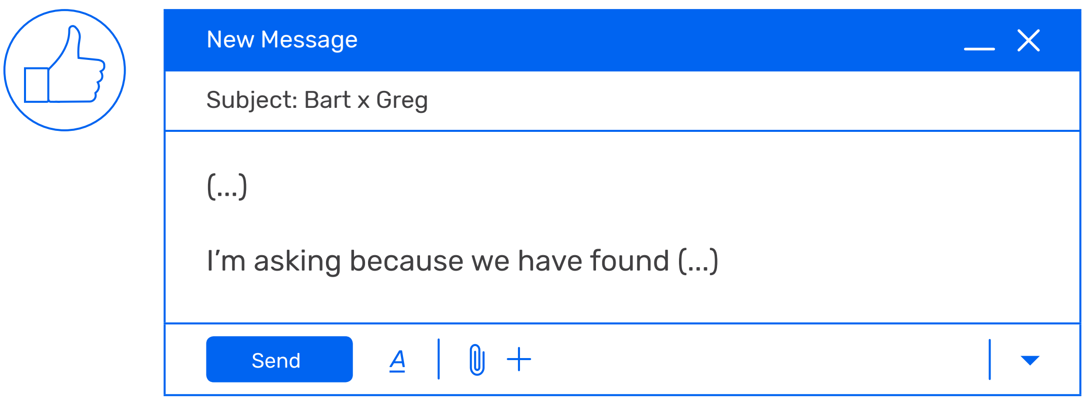
Send

or



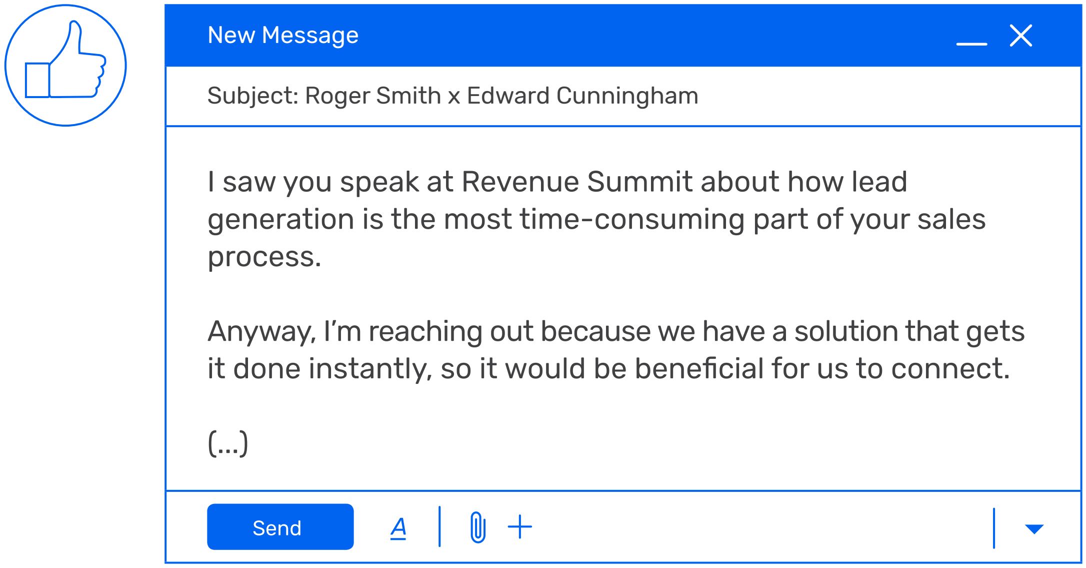

A few points stand out.

- **It makes a seamless transition from the intro**

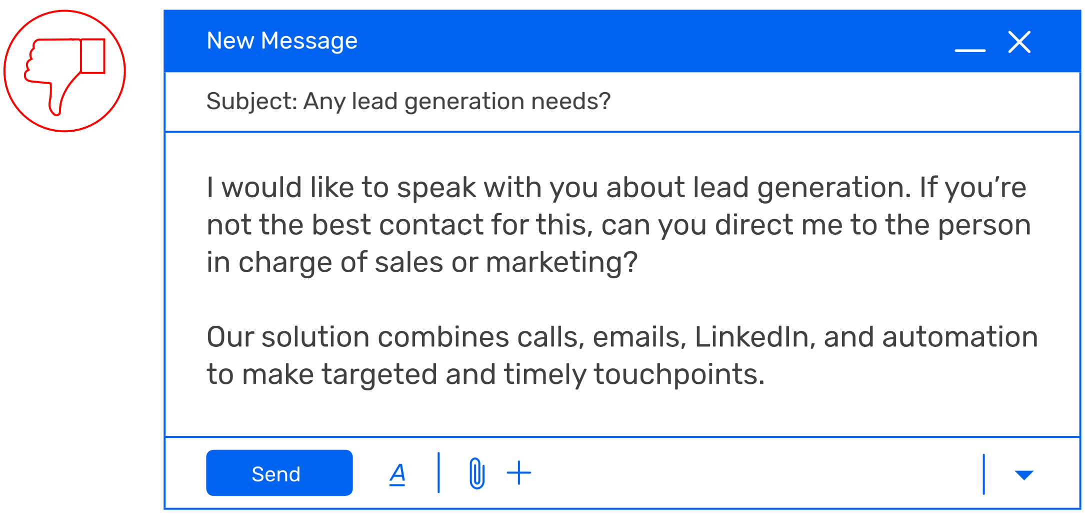



It should seem like the paragraphs are part of the same conversation. Asking a question is always a good method.

But you don’t have to ask a question to make a seamless transition.



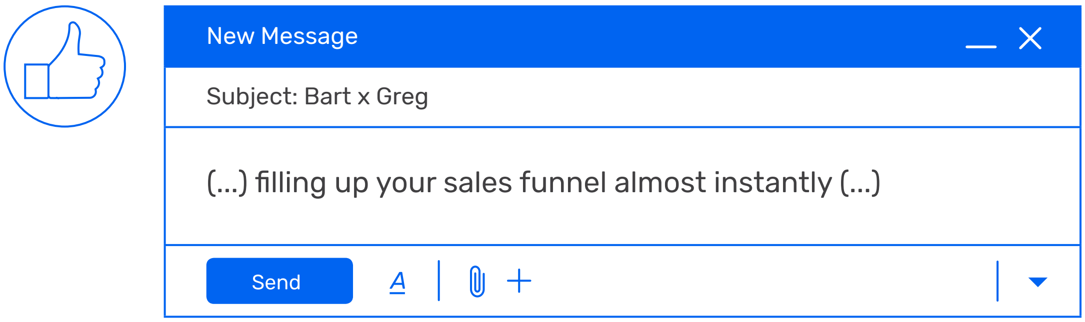

A problem arises when there is a disconnect between the first paragraph and the second.



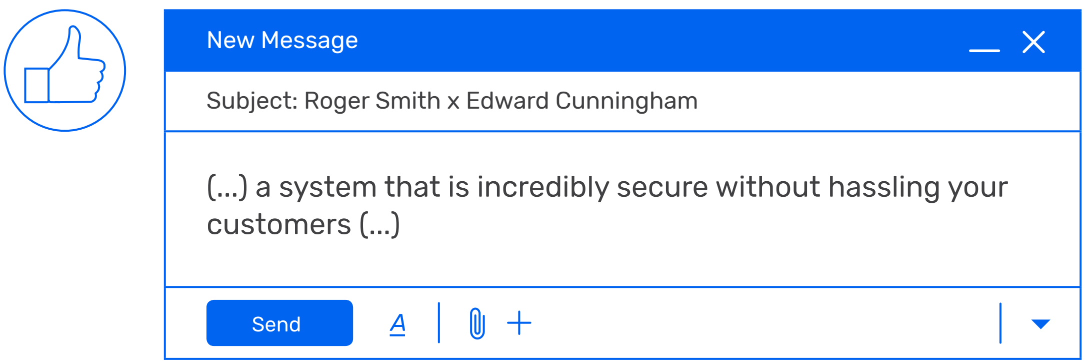

It looks like these two paragraphs are from separate emails. The second paragraph seems to be irrelevant to the question in the first paragraph.

- **It talks about benefits**

Here is a benefit we mention in our second paragraph.

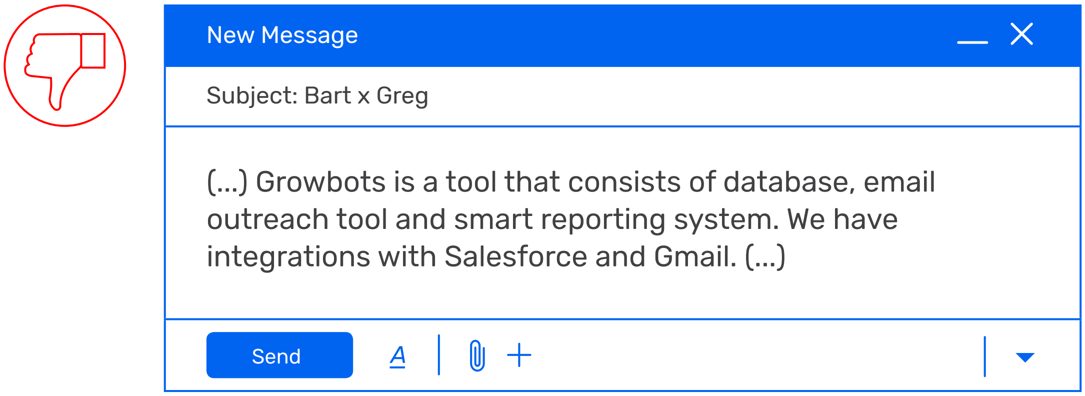



or



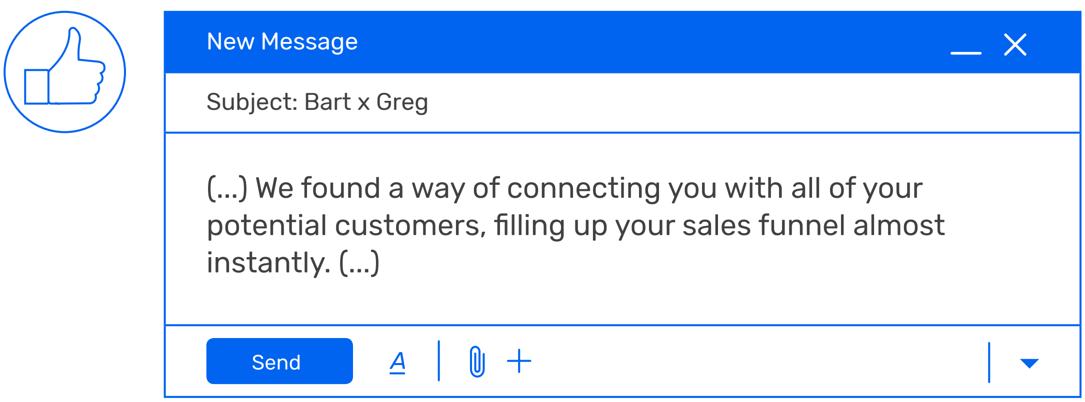

Notice how we don't talk about the way that our software works, just that it performs the job of lead generation instantly. Have great features? How are they relevant to your prospect? This is your chance to explain what job your product or service performs. And not just any jobs, the ones that your prospect needs to be done. All this information should be in your buyer persona.

But when we talk about features, it often comes out like this:



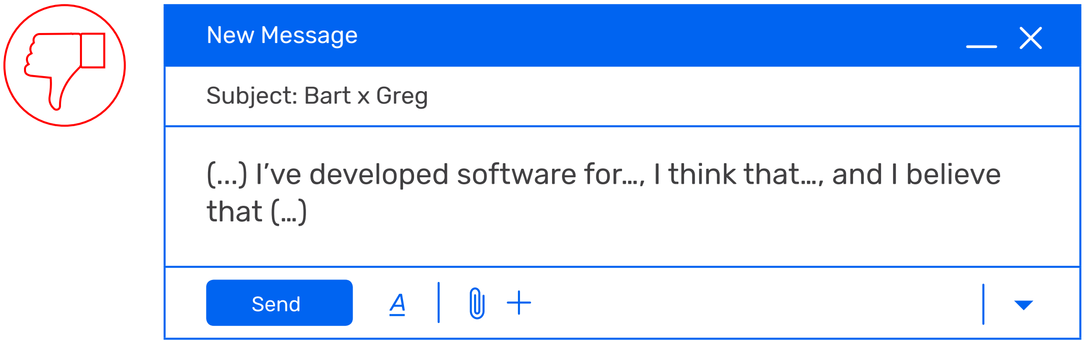

Don't get me wrong, those are great features but this sentence doesn't explain how they can be used and therefore they are useless out of context.

- <u>**Always use the second person**</u>




See how we made the message personal to the recipient by using you? We aren't talking about something that benefits somebody else. We are talking about something that benefits your recipient. Instead of *me*, *my*, and *they*, use *you*, *your*, and *our*. Too many emails talk about the sender and not things that the recipient actually cares about.

When you don't use *you*, it comes across as self-centered.




See how this language becomes all about you and ignores your prospect?

---

**Still don't know how to start your second paragraph?**

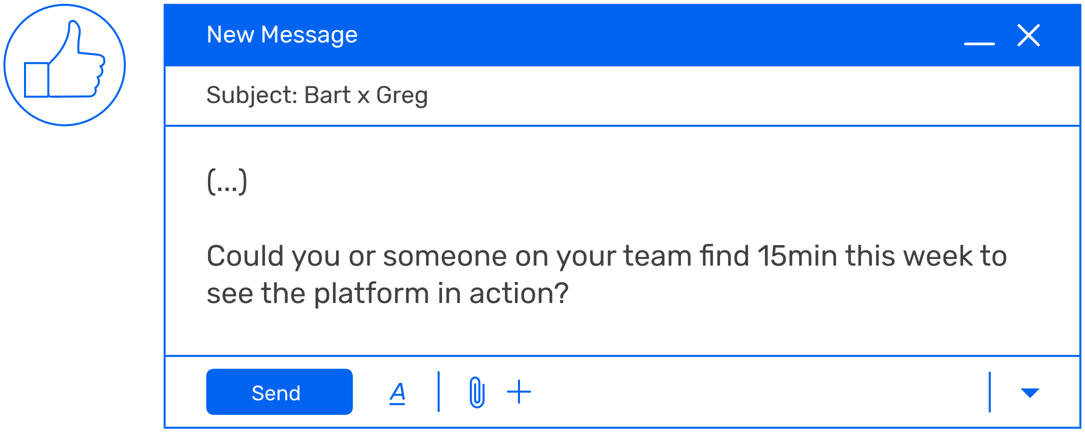
Just finish one of these sentences:

1. I'm asking because ... (we have a solution ...)
2. Anyway, I'm reaching out because ... (we found a way ...)
3. Anything that takes you smoothly from the introduction to the benefit of your product.

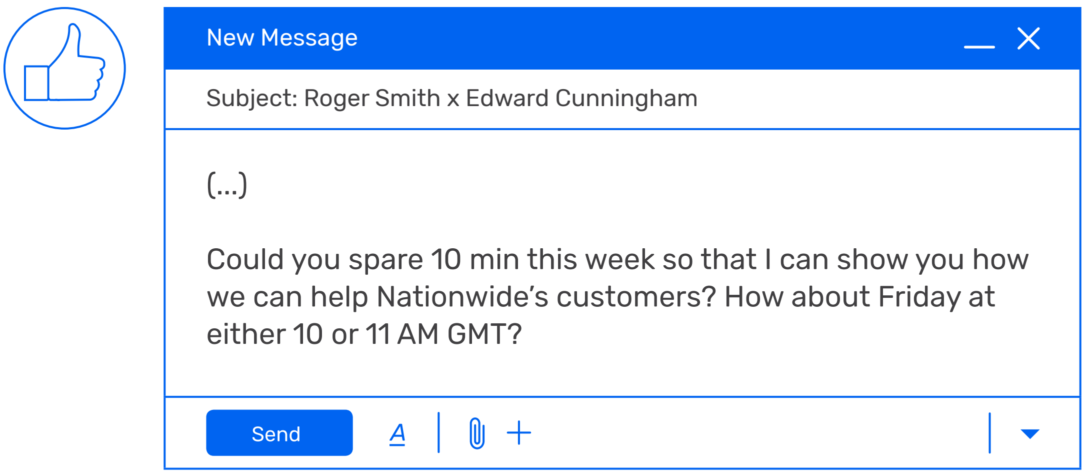
---

### Step 4: Write the call to action (CTA)

Are you ready to convert? This is where it happens. A strong CTA should clearly say what you want your recipient to do. Check out what we did in our message:

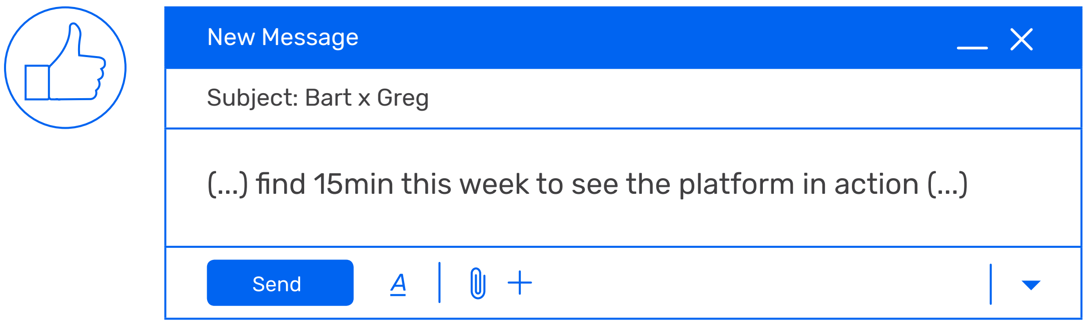



or



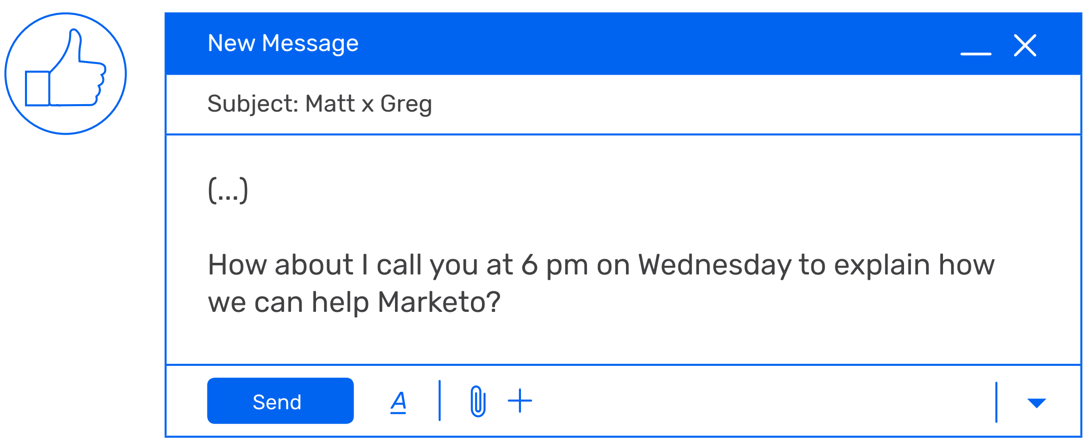

In this CTA, we said exactly what we wanted our prospect to do, meet for a demo or a meeting in these cases. Think of it like closing a sale but with the difference that you are scheduling a meeting. There are a couple of things you should remember when crafting your CTA.

- **Be as specific as possible**

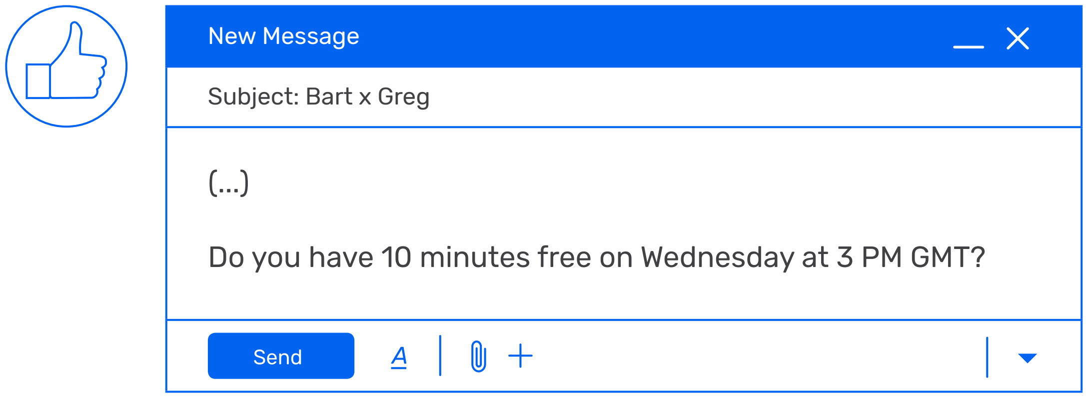



See how we said exactly what we wanted? 15 min for a demo, this week. Don't ask for a vague request without a specific response timeline. Ask for a specific response within a specific timeframe.

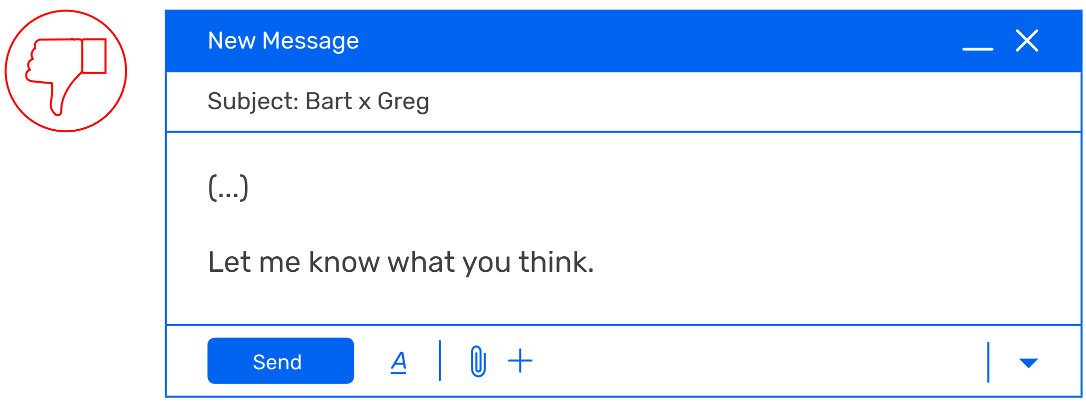
It can be useful to include a specific time for a reply, like in this next example. Your prospect may not be available but this could open up a conversation about scheduling.



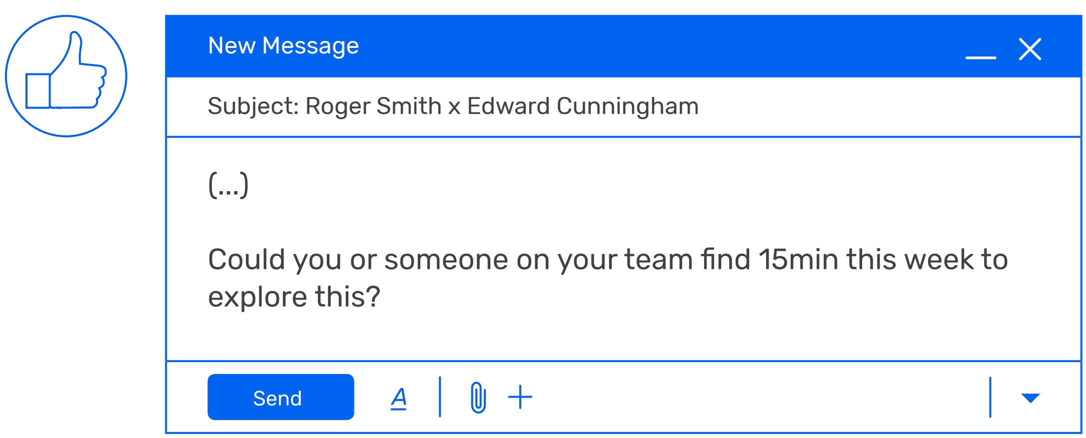

or




When you leave your request open-ended, your prospect doesn't know what to do next, like in this case:

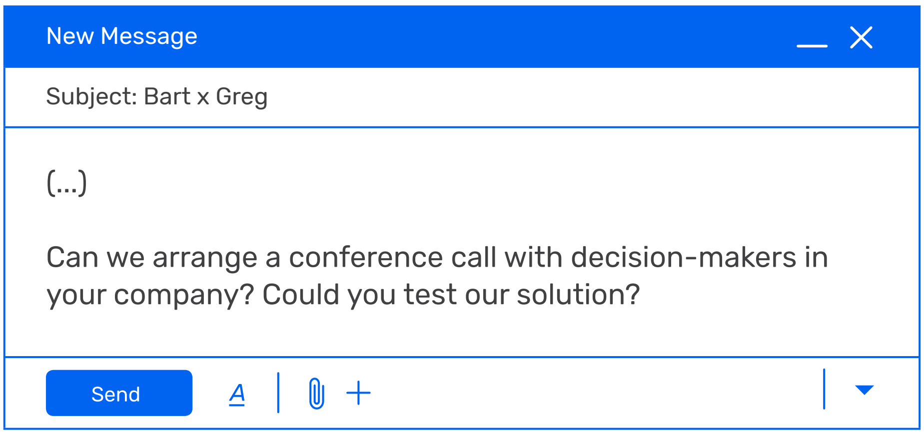



- **Don't ask for too much**



See how we just ask for 15 min? You just want the start of a conversation, schedule a quick meeting, or arrange a conference call, not close for a sale.

When you ask for too much like in the next example, it is unlikely that you will get your meeting.




It is basic common sense. Why would all of the decision makers come together and then test a product that they had no knowledge or understanding of?

---

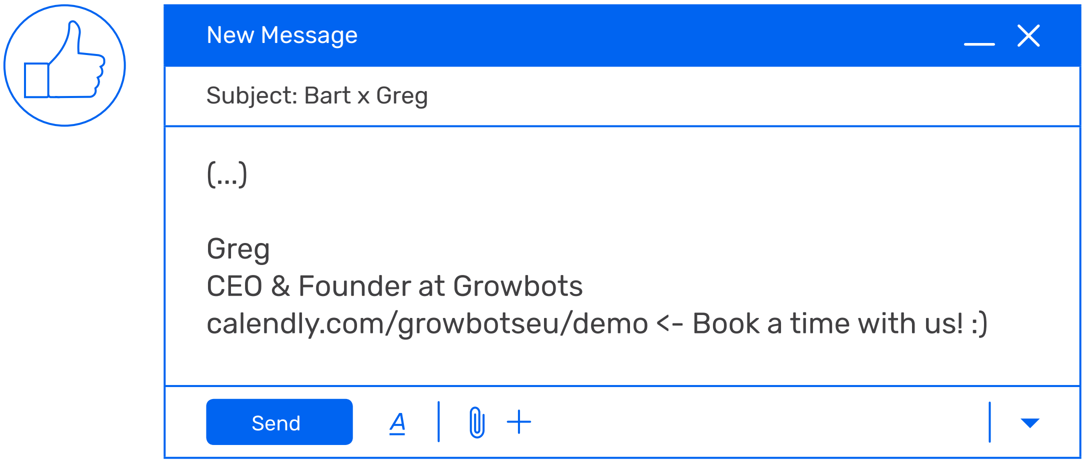
**Still don't know how to start your CTA?**

Just finish one of these sentences:

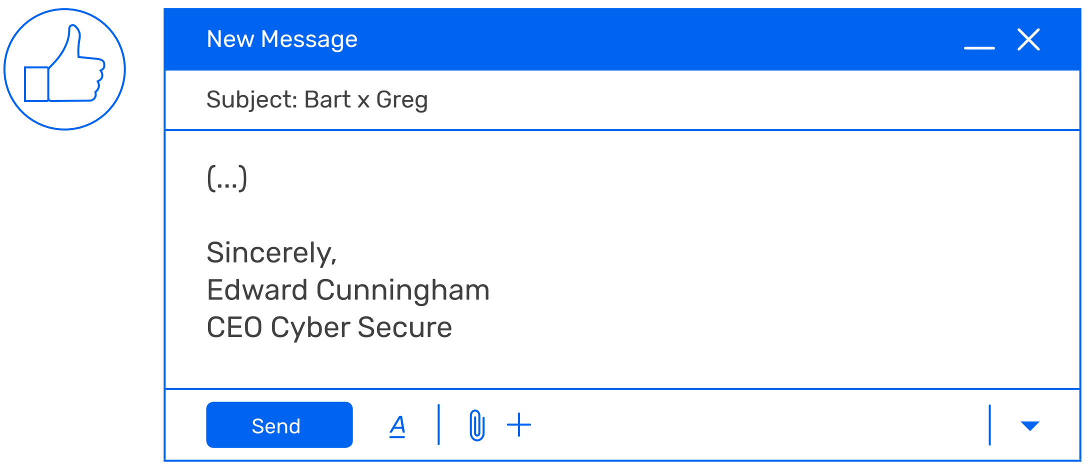
1. Could you have some time on ... to ....
2. Can we connect on ... to ...
3. How about we have a ... to ....

---

## Step 5: Write the footer

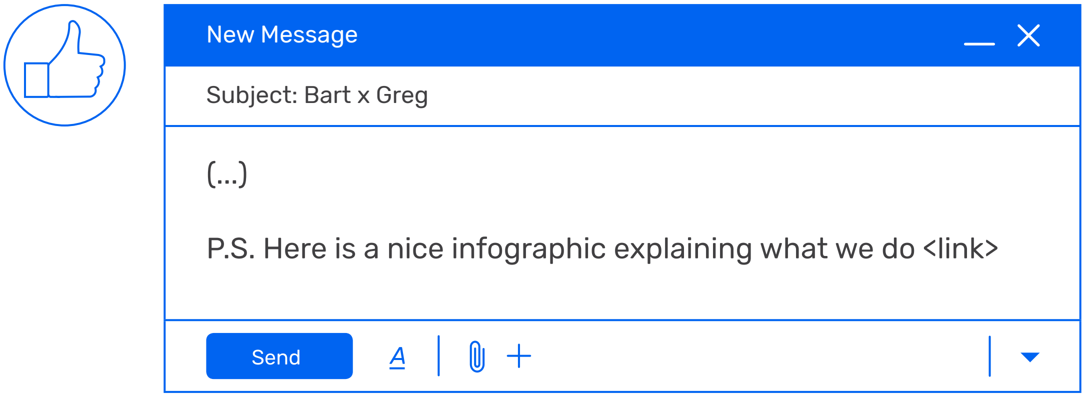



or

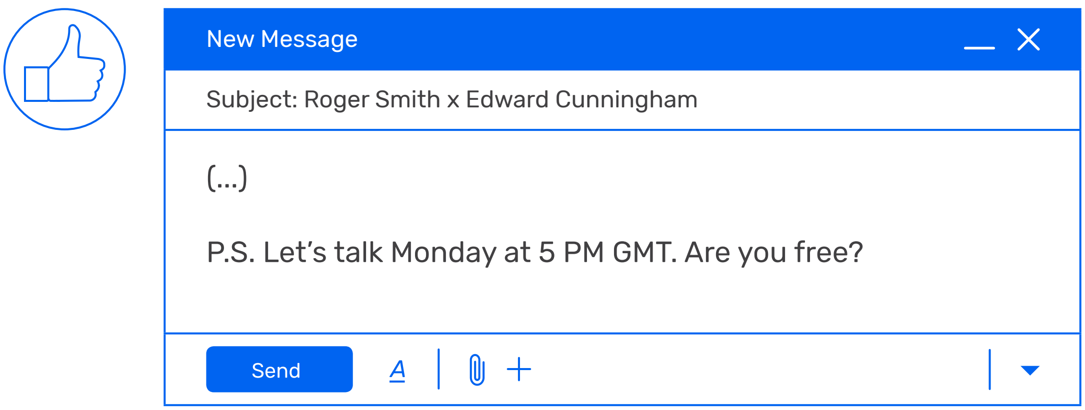



This is the last bit you should always include. It should be modest, but include a link to your website in a less formal campaign. You'll find it to be a useful place to add a link to your scheduling page. Notice how for the second, more formal example, you forgo a link to Calendly and use formal styles like "Sincerely,"?

### Step 6: Write the P.S.




or




Do you think that most people don't make it down this far? Think again. In his study of direct mail, Professor Siegfried Vogele in *Handbook of Direct Mail* found that up to 90 percent of people read the P.S. before the first paragraph. Email outreach is no different. This is a great place to include an external link if you have one, though these should be kept to a minimum.

**Still don’t know what to write in your P.S.?**

Just finish one of these sentences:

1. P.S. here is a link to ... (case study, infographic)
2. P.S. do you know that ... (90% of people read P.S. before the first paragraph? :))
3. P.S. if you want to schedule time with us right away, here is a link to our calendar.

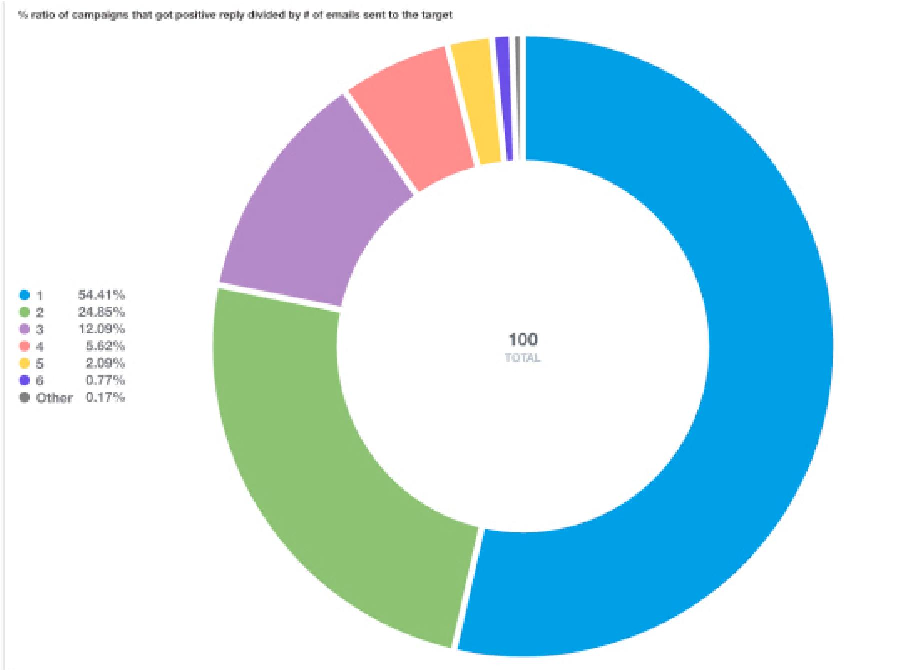
Share:

## Step 7: Write your follow-ups

Your first message is probably the most important message in the campaign. Now comes the difficult part, waiting for a response. You can choose to sit in your office, waiting for a prospect who will never email you back or you can be proactive. Know how many of our leads get back to us after the first message? A bit over 50%.

You can look at this two ways. One is that the first message is the most important and it is worth most, if not all, of your attention. The other (correct) way is that if you stop after your first message, you are leaving half of your warm leads on the table. Your follow-ups are basically performing the mop-up operation for your campaign. How does their impact measure up?

At Growbots, we have done a study of over one million prospects that have been contacted by our users. The percentages of positive responses that they got after each message are as follows:




This shows that only the first message and the three follow-ups get meaningful responses, as they account for 97 percent of all responses. The last three percent are spread over 4 or 5 messages in the campaign. We don't suggest that you pursue these immediately after the first three follow-ups. As sales expert Anthony Iannarino says, "There is a line between being persistent and being a nuisance, and it's one you should never cross

### Approaches to crafting follow-up emails

When crafting your follow-up messages there are a couple approaches you can take. In fact, it is essential to have a combination of different types of follow-ups in your campaign. A method that works for us goes as follows:

- **First follow-up:** Quick question as to whether they received your first message.
- **Second follow-up:** Should add value. This is a good time to include social proof.

- **Third follow-up:** This is a quick reminder that you are interested in talking with a short piece of info. This is a good time to add a link in your P.S.

It is worth experimenting with different combinations of these in order to find the one that gets you the best result.

The first is the **short approach.**

New Message

Subject: Bart x Greg

Have you received my message, {{ first_name }}?

P.S. here is an infographic explaining what we do :)

Send

or

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

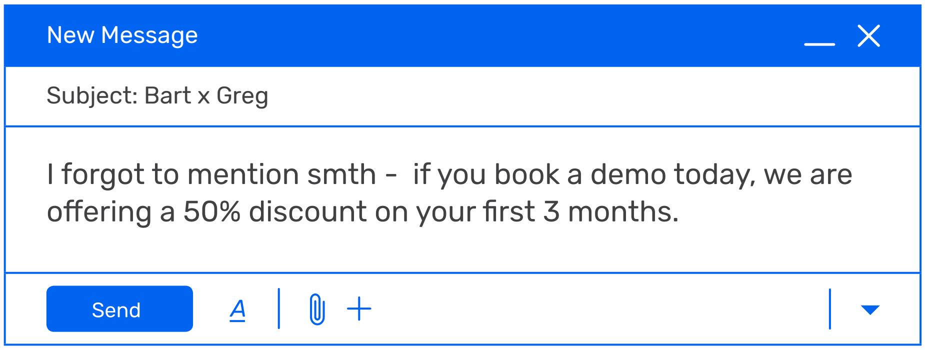
Have you had the opportunity to read my message?

P.S. Let's talk Monday at 5 PM GMT. Are you free?

Send

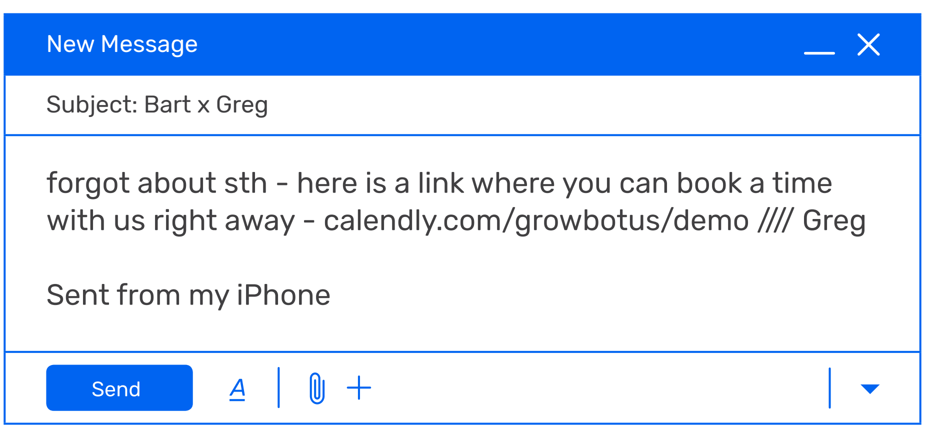
This is a quick reminder asking if the recipient has received any of the messages you have sent previously. Its sole intention is to keep your pitch at the front of their mind. That said, you can always add some value in the P.S. This can take the form of an article or infographic. But don't forget, always link to media rather than including it in the message.

### The Oh I Forgot to Mention trick




To add to the impression that the message your prospect receives was written just for them, schedule a quick follow-up to be sent about 1 hour after your main message. This should include some added value, like a discount that you appear to have only remembered a few minutes after writing the first message.

One good Idea to include with the short approach is to include the "Sent from my iPhone" trick like we have done here:



This shows you are a busy person. You are still working even when you're out of the office and yet you still have been able to take the time out of your busy day to send a personalized message to your prospect, manually. Don't have a smartphone (it works just as well with Android or anything else)? Sending this from work? Doesn't matter.

The effect is the same if you simply add "Sent from my iPhone" (or your phone of choice) to your footer. A short message is a good place to add a few typos, to give the appearance that you sent the message on the fly.

The second approach is the **long approach**.

New Message

Subject: Bart x Greg

Bart, I fully understand that answering my email is not your top priority, but I'll try to convince you that it should be. How? With "social proof" aka "why should you trust me?" - the most basic sales technique ;)

Here it is:
- We have more than 500 happy customers (some of their love & case studies here - https://www.growbots.com/customers)
- It's so dead simple that the founder alone is able to set up 20 meetings in a day
- "The thing I really like about Growbots is that the tool is easy to use and that it's a massive time-saver."
- "Using Growbots, I don't worry about prospecting or lead generation, I just close deals"
- And last but not least, we ourselves are growing our revenue 20% every month using our solution ONLY, pure outbound - it has to work, right?

Bart, all I'm asking is 15 minutes of your time (or your colleague's) in order to check whether we can help Readz, please.

Send

or

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

I understand that you are weary of answering an email from somebody you don't know. You don't know if we can provide you with legitimate value. So let me convince you by explaining how we have helped other institutions like yours.

-We have over 1,000 happy customers, including 25 financial institutions based in the City of London. (You can check out some of their case studies here)
-The security procedures are so simple that one of our customers saw a 50% uptick in internet banking logins after launching our solution.
-"Cyber Secure moved older customers from our high street branches to our online bank, cutting operations costs by 10%"
-"We have seen a 30% drop in major security breaches since implementing Cyber Secure"

All I'm asking you for Roger is 10 minutes to show you how we can transform your online business. Are you free on Monday at 3, 4 or 5 PM GMT? Let's meet then.

Send

This is a bit more than a reminder. In these emails, you have a few options. You can also use this as an opportunity to give extensive social proof, case studies, or explain additional benefits that the product could have for the customer.

To write a good follow-up you should:

- **Reference the follow-ups that came before**
- **Always include a call to action at the end**

- **Use long follow-ups to give supporting evidence and short follow-ups to check if the recipient has read the message**

---

**Your whole campaign needs to be a consistent flow, not a series of stand-alone messages.**

- Don't repeat the things you mentioned in previous messages.
- Elaborate on your benefits in the next messages.
- Reference the previous messages in a humorous way.

Your job is to craft a story and not any old story; it has to be a **compelling and interesting** story!

---

## REMEMBER THIS WHEN WRITING YOUR CAMPAIGN:

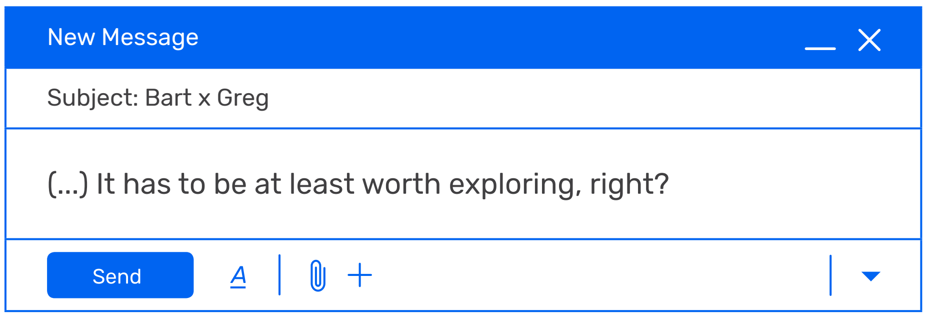
1 Write something personal

A surefire way to make somebody lose interest in your content is to forget to include your personality in it. Just because you are using automation doesn't mean that your content should look like it was written by a robot. Quite the opposite in fact.

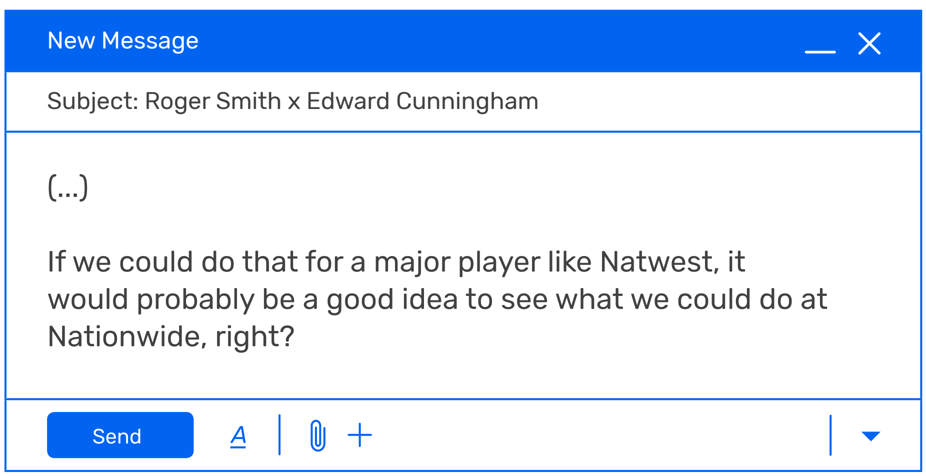
## 2 Use a conversational tone

Using rigid, boring language does not make me excited to hop on the phone with you. If you come off like a cool person, I might just want to do business.

Use phrases like:



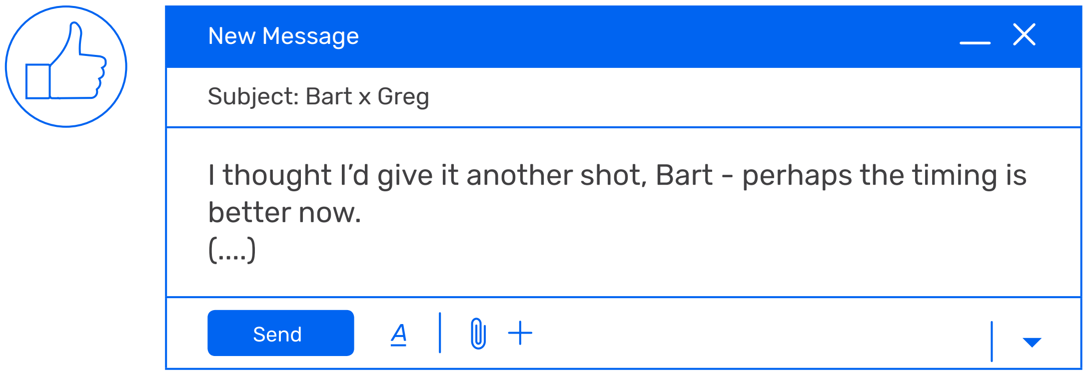

or



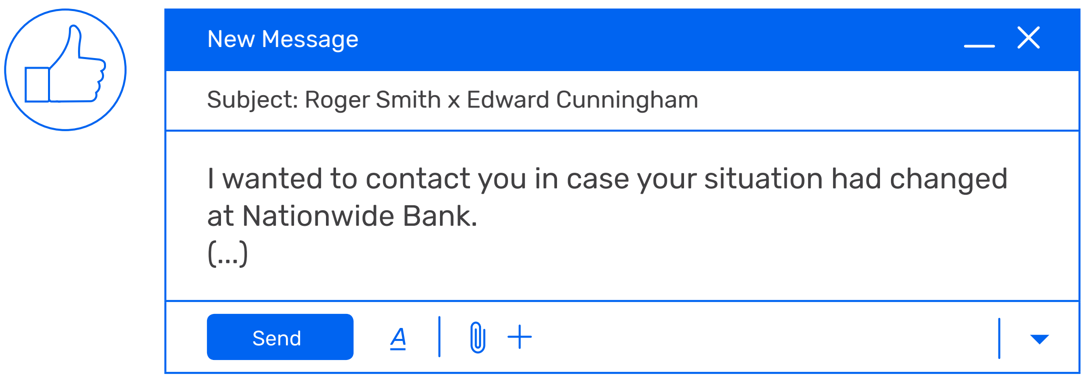

## 3 Use appropriate language

It's super important to adjust your tone to the persona you are targeting. A 50-year-old director from Target might respond to different language than a 24-year-old startup founder.

For instance, see how you might address a startup founder:

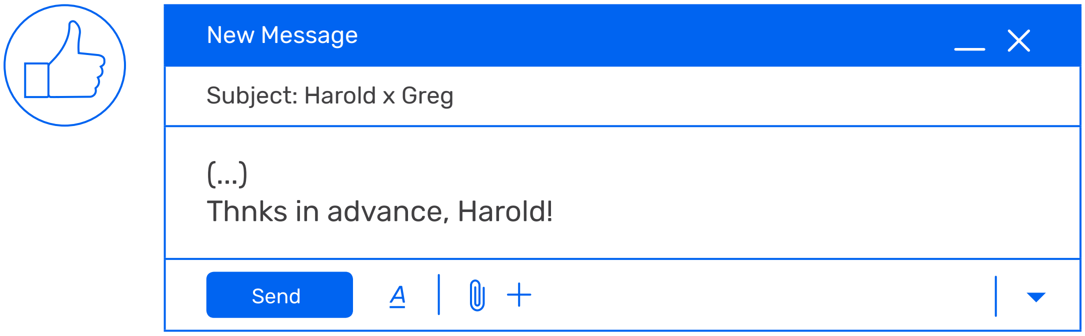



And a bank manager:




## 4 Find ways to make yourself more human

Sometimes it can be useful to purposely include a few typos and other small mistakes to make you seem less robotic. That said, try not to make it look too sloppy as that may turn your reader off to your message.




5

## Keep links to a minimum

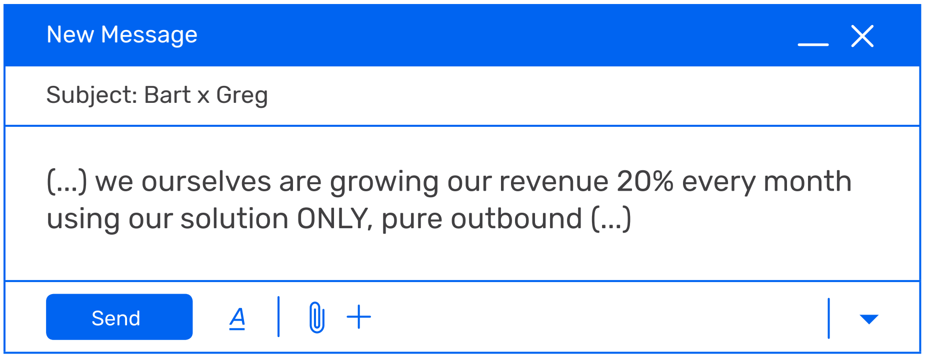
Remember how we said that the P.S. is a good place for a link? It is but that should probably be the only link. The reason for this is a psychological concept called the Paradox of Choice. In other words, the more choices you have, the less likely it is that you will choose anything.

What it means in this situation is that the more links we put in a message, the less likely it is that the recipient will click on any of them. On top of that, spam filters have a higher chance of bouncing a message that has a high ratio of links to text. Anyway, you shouldn't flood your prospect with too much information before you get a positive response.

6

## People like numbers

A benefit is hard to argue when you can't point to objective results. Whether in headlines or in content, numbers and data make your argument appear objective and authoritative. Use as many results as you can to prove your point.




7

## Use Social Proof

You think your product is great and it probably is. The thing is you still need to get over your customer's skepticism for a few reasons.

1. **They don't know if your product has worked under real life conditions.**
2. **You are the only person providing them with verifiable information.**
3. **Your product might work for some companies but not theirs.**

This is where social proof sweeps into fill the void and calm your customers' concerns. Basically social proof exists so that your customers don't have to rely on your word alone that your product will help them. It consists of outside endorsements and examples of your product working in similar situations to that of your customer. It has even been found to be more effective than stating benefits in some cases. In practice, social proof can take a few forms.

- **The names of killer brands or companies similar to the one you are targeting that you have helped**

Both Procter & Gamble and Microsoft use us to develop customer social engagement.

- **The number of customers you have**
  We currently help 43 small business with their accounting needs.
- **Examples of how you have helped companies in the past**
  Growbots helped GetResponse decrease the number of tools used in their sales process and unify their lead sources

- **Complete case studies of how your customers have been able to succeed using your product or service. Here's one we use.**
  Try to find a case study that matches a similar ICP to one of the prospects you are targeting. It will help your prospect get a better idea of how you can help them.

- **Awards/prizes**
  Winner of best enterprise level SaaS product- SaaS Awards 2016

- **Positive review from sites like G2 Crowd**
  "We needed a way to increase outreach but didn't have the time to recruit, interview, train, and ramp more SDRs.

Growbots nailed it."

Any of these examples can be used to boost your follow-ups. They can be particularly useful in the long messages, but also in the P.S. of a short message.

### Step 8: Come back to prospects who haven't responded

So, once you have sent your third follow-up and didn't get a response, that prospect is dead, right? Well, don't give up on them just yet. Remember how we said when talking about ideal customer profiles, that an ideal customer isn't just somebody who can benefit from your product? They also have to be at a point where they need it to solve a problem, have an awareness of the problem, a willingness to fix it, and the means to do so.

Those factors may not have lined up over the period that you sent out your drip campaign, but things change. I wouldn't recommend beating a dead horse with a ton of follow-ups as that would be spammy and hurt your reputation. Instead, after your initial follow-ups put a pause into your campaign of a few weeks to a month and have another go at trying to convert your lead.

- **It must be a different set of messages than the first try**
  Just sending the same set of messages all over again won't work. As Cold Email Guru Heather Morgan points out, "Sending a series of bland and boring emails that repeat the same things over and over does not qualify as following up." This new campaign has to contain a new set of messages, in a new thread, without reference to your initial thread of messages.

### The sending frequency of the messages in your campaign

After honing our technique over the last two years, we have found a scheduling formula that has given us an impressive 5% conversion rate. It goes as follows:

**1. First message**
(If you choose to use the I forgot to mention trick,
send it 1 hour after this first message)

**2. First follow-up:** 3 days after the first message

**3. Second follow-up:** 5 days after the first follow-up

**4. Third follow-up:** 7 days after the second follow-up

(If your prospect doesn't reply after the third follow-up,
wait for three to four weeks to let your message sink in)

**5. First message of new thread:** 3 to 4 weeks

**6. Second message of the new thread:** 5 days after the first message in the new thread

**7. Third message of the new thread:** 7 days after the second message in the new thread

Share:

# A COMPLETE CAMPAIGN

That was a lot to go through. Now let's see what a finished campaign looks like using informal language

**1st message** - the first email of the campaign

New Message

Subject: Bart x Greg

Hi Bart,

common ground

One quick question for a fellow CEO - since I checked out your team lineup and couldn't find anyone responsible for lead generation. I'm curious, how do you handle extending your customer base at Readz?

personalized in a business context

smooth transition from introduction

I'm asking because we have found a way of connecting you with all of your potential customers, filling up your sales funnel almost instantly.

the benefit

giving two ways out

Could you or someone on your team find 15min on Wednesday to see the platform in action?

specific CTA

*Greg*
*CEO & Founder at Growbots*

Send

## **2nd message** - the “I forgot to mention” email - sent 1 hour after

New Message

Subject: Bart x Greg

I forgot to mention smth - here is a link where you can book a time with us right away - calendly.com/growbotsus/demo ///// Greg

Sent from my iPhone

Send

→ human touch

## **3rd message** - the first follow-up - sent 3 days after

New Message

Subject: Bart x Greg

Have you received my message, Bart? → just a short reminder

P.S. here is a case study of another tech startup we helped https://www.growbots.com/case_studies/Ader :)

→ value added

*Greg*
*CEO & Founder at Growbots*
calendly.com/growbotsus/demo <- Book a time with us! :)

easy to book meeting ←

Send

## **4th message** - the second follow-up - sent 5 days after

New Message

Subject: Bart x Greg

Bart, I fully understand that answering my email is not your top priority, but I'll try to convince you that it should be. How? With "social proof" aka "why should you trust me?" - the most basic sales technique ;)

no-bullshit approach

Here it is:
- We have more than 500 happy customers (some of their love & case studies here - https://www.growbots.com/customers)
- It's so dead simple that the founder alone is able to set up 20 meetings in a day
- "The thing I really like about Growbots is that the tool is easy to use and that it's a massive time-saver."
- "Using Growbots, I don't worry about prospecting or lead generation, I just close deals"
- And last but not least, we ourselves are growing our revenue 20% every month using our solution ONLY, pure outbound - it has to work, right?

adding value with a lot of social proof

Bart, all I'm asking is 15 minutes of your time (or your colleague's) in order to check whether we can help Readz, please.

*Greg*
*CEO & Founder at Growbots*
calendly.com/growbotsus/demo <- Book a time with us! :)

Send

## **5th message** - the third follow-up - sent 7 days after

New Message

Subject: Bart x Greg

Bart? :) human touch

*Greg*
*CEO & Founder at Growbots*
calendly.com/growbotsus/demo <- Book a time with us! :)

Send

## **6th message** - the first email in the new thread - sent 30 days after

let them rest...

New Message

Subject: Bart x Greg

I thought I'd give it another shot, Bart - perhaps the timing is better now.

As a reminder: we've created software that is able to connect you with all of your potential customers right away. These are results you should expect from trying our approach:

message in new thread = you have to remind them what you do

Reports

| ACTIVE PROSPECTS | OPENED | OPEN RATE | REPLIED | REPLY RATE | OPPORTUNIES | OPPORTUNITY RATE |
|---|---|---|---|---|---|---|
| 40542 | 25021 | 62% | 9048 | 22% | 2028 | 5% |

visualized value

It has to be at least worth exploring, right? Let me know if you are up for a quick demo ;)

Cheers!

*Greg*
*CEO & Founder at Growbots*
calendly.com/growbotsus/demo <- Book a time with us! :)

Send

## **7th message** - the first follow-up - sent 5 days after

New Message

Subject: Bart x Greg

Just a kind reminder about my previous message.

Bart, give us 15 minutes of your time and we'll show you how data-driven magic can fill up your pipeline @ Readz.

*Greg*
*CEO & Founder at Growbots*
calendly.com/growbotsus/demo <- Book a time with us! :)

Send

## **8th message** - the second follow-up - sent 7 days after

New Message

Subject: Bart x Greg

Subject: Bart x Greg

Bart, apologies if I'm being too persistent, but I really believe there is a fit between our companies - so it would be a waste to drop this opportunity (we have great successes with companies of your profile).

If you are too busy, maybe someone from your team can talk with me? → a smart way out

Thank you in advance, Bart!

*Greg*
*CEO & Founder at Growbots*
calendly.com/growbotsus/demo <- Book a time with us! :)

Send

## RESULTS:

**78%** open-rate | **22%** reply rate | **5%** warm lead rate

And here is a campaign using formal language. There are a few big differences that you will notice:

- **It is treated like a formal letter with "Dear Roger," at the top of each message and "sincerely," at the end.**
- **The language isn't abbreviated.**
- **The scheduler link has been left out. Instead, there is a specific request to meet. If the prospect replies, you can still engage a tool like Calendly to secure the meeting.**

**1st message** - the first email of the campaign

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

I saw your keynote at the FP&A Innovation summit last April about the importance of cyber security in the financial sector. Could you tell me how you handle the verification process at Nationwide Bank, for your internet customers?

The reason why I'm asking is we have developed a system that is incredibly secure without hassling your customers with excessive verification procedures.

Could you spare 10 minutes this week so that I can show you how we can help Nationwide's customers? How about Friday at either 10 or 11 AM GMT?

P.S. If you don't want to hear from me, click here, but It would be a pity for you to miss out.

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Send

**2nd message** - the first follow-up - sent 3 days after

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

Have you had the opportunity to read my message?

P.S. Let’s talk Monday at 5 PM GMT. Are you free?

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Sent from my iPhone

Send

**3rd message** - the second follow-up - sent 5 days after

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

I understand that you are weary of answering an email from somebody you don't know. You don't know if we can provide you with legitimate value. So, let me convince you by explaining how we have helped other institutions like yours.

-We have over 1000 happy customers, including 25 financial institutions based in the City of London. (You can check out some of their case studies here)
-The security procedures are so simple that one of our customers saw a 50% uptick in internet banking logins after launching our solution.
-"Cyber Secure moved older customers from our high street branches to our online bank, cutting operations costs by 10%"
-"We have seen a 30% drop in major security breaches since implementing Cyber Secure"

All I'm asking you for, Roger, is 10 minutes to show you how we can transform your online business. Are you free on Monday at 3, 4 or 5 PM GMT? Let's meet then.

P.S. If you don't want to hear from me, click here, but I hope you reconsider.

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Send

## **4th message** - the third follow-up - sent 7 days after

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

Have you received my messages? Let's meet on Tuesday at 3 PM GMT.

P.S. If you don't want to hear from me, you can click here and I will stop contacting you.

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Send

## **5th message** - the first email in the new thread - 30 days after

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

I wanted to contact you in case your situation had changed at Nationwide Bank.

This is so I could show you how we helped Natwest make their online presence more secure while increasing visits by 45%.

If we could do that for a major player like Natwest, it would probably be a good idea to see what we could do at Nationwide, right? Let's get coffee on Tuesday to talk it over.

P.S. If you don't want to hear about how we can help you like we helped Natwest, click here and I will stop contacting you.

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Send

## **6th message** - the first follow-up - sent 5 days after

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

I just wanted to remind you about my first message.

Remember, we only need 10 minutes to talk about how we could transform online banking at Nationwide. Do you have 10 minutes free on Wednesday at 3 PM GMT?

P.S. If you don't want to hear from me anymore, click here.

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Send

## **7th message** - the second follow-up - sent 7 days after

New Message

Subject: Roger Smith x Edward Cunningham

Dear Roger,

Please excuse me if I have been too persistent in contacting you. The thing is that I think Cyber Secure could do amazing things for Nationwide Bank. It would be a missed opportunity if we never got to meet.

I understand that you are a busy man so I would very much like to speak to somebody else at your company if you are not available. How about we plan to speak at 9 PM GMT on Wednesday?

Thank you in advance, Roger.

*Sincerely,*
*Edward Cunningham*
*CEO Cyber Secure*

Send

## FAQs

### What subject line should I use?

A killer subject line can drive eyes to your message. The first rule is to not be deceptive. It is spammy to do so and will destroy the credibility of your message. To that end, don't pretend that your cold email is a reply.

In fact, you don't want to say too much here, four words max. This is a great opportunity to take advantage of customer fields to personalize. The approach we suggested earlier with your name and the customer's name is the best we have tested.

### How do I start a message?

Don't introduce yourself. This is about them not you. Write about their experience and common ground that the two of you have. This is a place where personalization can go a long way to grabbing your prospect's attention. You can check out a good example of how to start the messages in the section which covers the first paragraph.

### How do I write a pitch?

The important thing is to focus on the benefits you provide and the problems you solve for the customer. Avoid talking about yourself or the features of your product. It says more about you than it does about your prospect's situation. You can check out examples of how to pull this off in the section about how to write the second paragraph.

### Should I write a call to action in each message?

Definitely. You are trying to convert with each message you send. Therefore, you should always let your prospect know exactly what you want them to do. In most cases, it is to contact you with questions or to set up a meeting.

### Should I include an opt-out option?

The answer is yes, but the execution requires some nuance. Opt outs are important to ensure that your messages leave a good impression with your recipients. The problem is that your messages should sound personal and you wouldn't normally include an unsubscribe link in a message to someone you know.

We have found that messages like the one below have worked best for us. Give the option to unsubscribe with an unsubscribe link (like the one provided in Growbots) but suggest that it would be a missed opportunity.

> *If you don't want to hear from me, click here, but it would be a pity for you to miss out.*

CHAPTER 6

# WHAT TO DO WITH A WARM LEAD

You got a warm lead! Great, it's time to act on it. Learn how to turn a warm lead into a customer.

**Included in this chapter:** actionable advice for how to automate your follow-ups and get the most of your warm leads.

## IN THIS CHAPTER, YOU WILL LEARN HOW TO:

- Follow up on your warm lead, with the goal of scheduling a meeting.
- Pick automation tools to make following up easier and more efficient.

It worked! Through careful targeting and a well-crafted drip campaign, you were able to get a warm lead. This is normally where Growbots takes a bow and sets you up to move onto the next part of your sales pipeline. But we don't want to let you go without providing a roadmap for how to develop your lead.

At this point, it is important to remember that **you have somebody who wants to learn more. That is it. You have not closed the sale yet.** Your customer has only just learned that there is a solution to their problem. It is up to you to convert this warm lead into a meeting and then a sales qualified lead. As Jeff Blout says in his work Fanatical Prospecting, "The most valuable activity in the sales process is the set appointment". If you can sell them on the value that your kind of product offers them, you will be their first choice to get that value.

Does that sound obvious to you? Well, you would be surprised then to hear that we regularly have customers who expect to be closing on their warm leads. Still, others think that they have done their part to attract the interest of their customer and now the customer will take the initiative to find out more about the product or service being sold.

Of course, neither of these approaches will help you close any sales. To turn your warm lead into a sales qualified lead (or SQL), you will need to evaluate and qualify the lead, doggedly making contact with them until you have a clear yes or no answer as to whether they want to buy. Luckily, there are a number of tools at your disposal which can help you spend less time on the process while improving your overall results.

## THE GROWBOTS 8 RULES OF PERSISTENCE

1. Reply to every message (excluding really negative ones - you don't want to make them angrier). Even a short answer is a win.

2. Never stop sending follow-ups because you don't know how many it will take to convert somebody who has shown interest before.

3. Make hay while the sun shines. Once you get a message, reply ASAP (preferably call immediately), while the prospect is still new and interested. If you wait a few hours or days, they might forget you exist. The odds of qualifying a lead drops 6 times if you respond more than an hour after receiving the lead.

4. Your follow-ups will be frequent in the beginning (a reply to an email, a break for 1-2 days and a follow-up, 2-3 days and another follow-up and so on), but with time, they will become less frequent. Pay more attention to and follow up more frequently with your more invested leads.

5. Don't bury your reply in a long list of follow-ups.

- If a lead doesn't reply to 2-3 follow-ups, write another follow-up as a reply to his positive message, not as a reply to our 3rd follow-up.
  - If you do it this way, he sees his positive response right below your first follow-up, not a long series of follow-ups he didn't answer.

**Take note:** if one of the follow-ups was an extensive answer to a question, send a new follow-up as a reply to this message (the follow-up with that answer).

6 If a lead has any questions or doubts, you have to address each of them, clearly and completely, even if some of your answers are negative. A negative answer is simply an opportunity for you to persuade your lead that this is not a disqualifying concern.

7 If you addressed a doubt and the lead does not reply, this means you haven't actually resolved their doubt. In the next follow-ups, you need to address it again, this time even more thoroughly.

8 Have your team keep track of the way that they answer questions and address doubts. That way, the next time a lead asks that question or expresses that doubt, your sales reps will know how to respond.

**Step 1:** Evaluate the lead
**Step 2:** Be persistent in converting your lead
**Step 3:** Persuade your lead using the information in your buyer persona
**Step 4:** Optimize your responses using automation tools

### Step 1: Evaluate the lead

Right now, all you have is a returned email. Every reply takes a different approach. Even a neutral reply is something that you can work with. If you are lucky, your customer will want to schedule a meeting to learn more about the product.

The nature of this meeting will depend on the product you are selling. If you provide a service of some kind, this will probably be a call or video conference where you explain your value proposition in greater detail while fielding questions. If you are selling a product, be it a SaaS application or a device, this will probably take the form of a demo of some kind.

Whatever you are selling, you must move away from email and talk one on one. 80% of sales people still believe this to be the best way to close a sale. There will be opportunities to automate other parts of the follow-up process but you are now selling and nothing beats talking to a person when you are selling.

The key is to prioritize your sales people's time so that they spend it pitching the most promising leads. If you already have your meeting scheduled, Great! Pass go, collect $200, and jump straight to the section on tools (p. 115).

Of course, you will not always be that lucky right out of the gate. It is pretty common to get a neutral response. Somebody will ask you to tell them more, or often they will have a set list of objections that they want to be addressed. It is up to you to address all of these objections so that the customer is satisfied.

☞ **Address every objection and answer every question**

When it comes to answering follow-up questions, lesser sales reps might try to cut some corners. If there is one easy to answer objection, they will prioritize answering the low hanging fruit, while ignoring the other questions the lead has. Maybe one of the questions their lead asks cannot be answered favorably, however you spin it. So they make a tiny sin of omission by not responding to it and fall flat on their face.

Think of it from the lead's perspective. If you ask somebody three questions, how many answers do you expect to get? Probably three. So what would you think if you only got one answer? Probably that there is something that they are hiding. Even if there isn't any sinister motive for only providing one answer, the lead won't feel comfortable moving forward in the buying process until all of their questions and objections are addressed.

A good document to have prepared at this point is a case study. They do a few big jobs for you.  They:

- Describe the value that your product will provide for your customer.
- Provide examples of other customers' successes that match your prospect's situation.
- Use your previous wins as surrogates for your lead's future success.

Like a plate of finger sandwiches for your next party, these are best prepared in advance. Try to have a few for each ICP/buyer persona so that you have the perfect match on hand.

### Step 2: Be persistent in converting your lead

Preparation is important but the key at this phase is persistence. Do you remember when I said that the ideal drip campaign doesn't overstay its welcome? Well, those rules change once you get your warm lead. It is now reasonable, dare I say expected, to regularly pitch to your customer until you either convert them or they specifically ask you to stop. Why is that?

Because your leads are human. As humans, their focus changes and they get sidelined and distracted by things happening around them. **Somebody who gave an enthusiastic response to your initial outreach campaign might need six reminders before they schedule a demo.**

These can include different approaches to questions or concerns that they had shared with you earlier. Did you have a ton of information that you thought would be relevant to your customers but wouldn't fit in your drip campaign? This can be the time to share that with your lead. At the end of the day, you want to prove that you provide value.

### Step 3: Persuade your lead using the information in your buyer persona

In fact, your buyer persona will be very helpful in crafting your follow-up content. As Tony Zambito points out, your buyer persona already contains scenarios where your customer will need your product and what issues need to be addressed to make the sale. Along with the specific questions the lead has, you can address their unspoken concerns, taken from your job story and outlined in the buyer persona.

To explain this, I will use one of the buyer personas we use around the office, the head of marketing in a large organization where marketing handles lead generation. We already got his interest through a drip campaign. We explained how our outbound platform would provide him with a steady stream of leads to fill his marketing funnel.

Now it was up to us to capitalize on his interest to get him to book a demo. He had been unsure of the lead quality that we could generate as his other channels had been generating low-quality leads. They had also been coming in fits and starts and he was looking for a smoother flow.

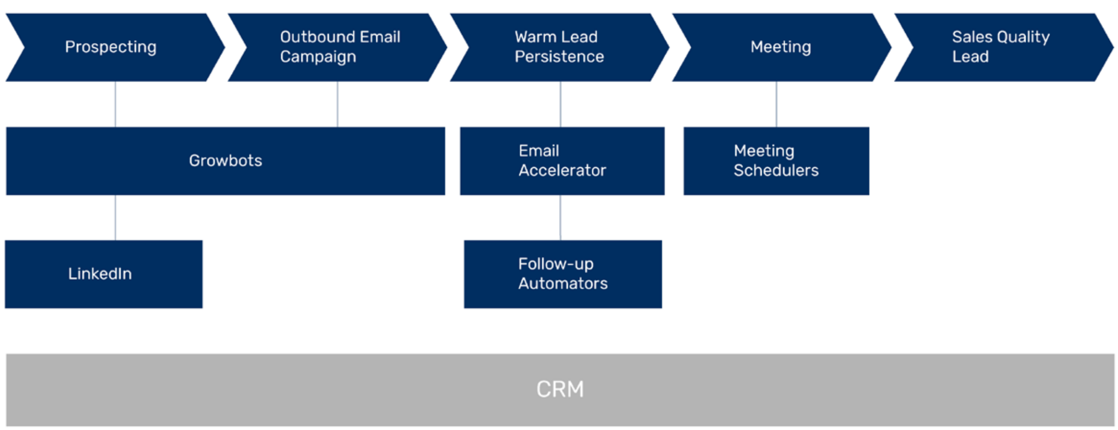
We explained how outbound is predictable while at the same time scaling nicely. We gave him statistics about how outbound generates higher value leads than the ones that generally flow in through his inbound channel. We also were able to look further into his needs than he had explicitly led on.

This persona suggested that somebody in his position was wrestling with an unwieldy tool stack which did not always play nicely with each other. We explained how Growbots was an all in one solution which integrates seamlessly with his Salesforce so that he wouldn't have to waste time managing his tools. We also knew about how reliant he was on his outbound channel. This means that we were able to provide information about how an outbound channel would compliment his inbound channel.

All of this information can prove to be useful in persuading the lead to engage with our sales team. From here, it was up to sales to qualify the lead and close the sale.

Share:

## Step 4: Optimize your responses using automation tools



At this point, it is worth taking a look at automation tools that can greatly improve the efficiency of your workflow. Here at Growbots, we are all about automating your sales pipeline and that doesn't stop after you have generated a warm lead using our tool. In fact, there are a number of steps in the sales pipeline which can be automated, freeing you up to get on with the important business of selling.

The Aberdeen group in a study on automated lead management found that 9% more top performing companies used automated lead management technologies than companies that lagged behind the benchmark. With that in mind, I want you to think about the number of prospects each member of your team can reach out to every day.

It can be up to 200 per email address and some of them will be reaching out with multiple email addresses, maximizing their time. Now let's say you convert on five percent of those addresses. That means that on top of your outreach duties, you will be starting ten new follow-up conversations for each day of prospecting. Considering that these conversations can include ten or more touch points until you can land a face-to-face. That is a lot of contact, that you need to keep track of.

**Enter your email accelerator.**

Follow-ups require personalized responses that are crafted to specifically address the concerns of the customer. Luckily for you, you have already predicted what most of these will be through your ICP and buyer personas. This means that you can have a set of follow-ups ready to address any question that might come up.

With tools like Cirrus Insight and Mixmax, you have these follow-ups ready to insert into your conversation. Additionally, both of these tools will integrate with Salesforce, your CRM (more on this in a bit) so that you don't have to manually input touch points.

### Automate your follow-ups

To complement your email accelerator, you have a class of tools specifically for follow-up automation. The likes of followup.cc, rebump, and vocus allow you to set up sequences for your warm leads in much the same way Growbots does for your cold prospects. Essentially, they will take care of the touch points you set with your prospects so that they are delivered regularly and optimally.

To use these tools most effectively, here are some points to remember.

- **Always make your follow-ups personal**
  In outbound sales, all you need are a few well-placed custom fields and you can send out personalized cold messages to a large group of prospects. That all changes once you are in a dialogue. A prepared response is valuable as it means you don't have to spend time crafting similar messages to a bunch of different people.

  That doesn't mean that your recipient will appreciate a canned response that does not directly address their question or situation. As is stated in the Aberdeen group's study *Email Marketing: Get Personal with Your Customers*, there is a difference between personalized messages and personal messages.

A personalized message means adding the recipient's name to the message. A personal message is one that addressed the exact issue the customer has. Take a bit of time once you pick the best responses to make sure the information you are sending is directly applicable to their query and does not contain any extraneous information that will make it look like a canned response.

The same study found that the top performing companies are almost four times more likely to send personal emails than companies whose performance has lagged behind.

- **Check timing**
  Remember how timing your messages was important during your outreach campaign? It still is now.  Email automators let you schedule messages so that you can get your work done all at once. You can send messages when they are most likely to be read.

### Use a meeting scheduler to hold more of the meeting you schedule

Once your prospect has agreed to a meeting, a meeting scheduler like Calendly will increase your success rate in two ways. First, it removes the back and forth that can bog down scheduling. Your meeting scheduler will simply send your lead a list of times you are available so that they can pick the ideal time with one click.  Each conflict is a point that the lead could drop out of the engagement so it is best to remove them where you can.  The tool then will automatically remind your prospect of the upcoming meeting.

Just automating the reminder is enough to bump up your meeting attendance rate by roughly 24 percent while saving you a great deal of time and aggravation. I'm talking about going from 50 percent meeting attendance to 74 percent meeting attendance, in our case.

### Use a CRM to track every touch point you have with your customers

The tools I have mentioned so far are important in automating and improving key parts of the outbound process. But there is one big tool that is more important than all the rest. A tool that can shepherd you through the entire sales cycle, one that makes sure you don't drop the ball at any point along the way. For that, you will need a CRM. Already got one? Great. You can input outbound leads the same way you would input any other lead.

If you haven't got a CRM, though, you should strongly consider getting one. Once you get your warm lead from Growbots, you need to track your entire interaction with that customer. After all, it is now up to you to close the sale. You don't want to squander a sale because you forgot to address questions your lead had before a meeting. So how does a CRM do it? Basically, they track every touch point a given customer has with you. The most common of these are:

- Initial positive replies
- Follow-ups
- Lead qualification
- Sales
- Aftersales

This means that you can have a real-time record of where a customer is in your pipeline. Armed with this information, you can forecast sales and track the performance of your team. To find out which metrics are most important, check out the chapter on optimization.

A little research will reveal that there are a ton of options when it comes to CRMs. So, what should you be looking for? There are CRMs for all shapes, sizes, and verticals but here are a few general qualities that stand out taken from *Business News Daily*:

- **Cloud based**
  Working in the cloud will mean that it is easy to update wherever your sales team happens to be at the time. It will also give you flexibility if you want to scale.

- **Secure**
  You don't want any prying eyes to be able to collect information from your sale cycle. If you are using a cloud-based solution, make sure it has a secure reputation.

- **Easy to use**
  A tool is only as good as your ability to use it. If you have to spend a ton of man hours either in training people to use the tool or performing complicated tasks, the CRM loses its value.

- **Third party integrations**
  We learned that as the number of tools we used grew, we became increasingly reliant on their ability to integrate with our CRM. In fact, at Growbots, we changed from a CRM that had worked well for us (close.io) in the past to Salesforce,

simply because of the integrations that Salesforce offered us. This may not be as important to a small company with a less complicated sales and marketing stack.

- **Relevant to your industry**
  There are certain CRMs that are designed for specific verticals like finance or medicine. It can be worth it to use a CRM targeted at what you do, particularly in verticals that have strict regulations and reporting requirements.

- **Fits the size of your company but can scale if it needs to**
  It makes no sense to use an enterprise CRM for a startup with only ten people. It will probably be too expensive and complicated for your needs. That said, keep an eye on how you plan to grow. For the sake of continuity, a CRM that grows with your needs can save you a lot of headaches down the line.

So now that you know what to look for, let's take a look at some of the options out there.

- **Free options**
  Luckily you don't have to shell out anything for the most basic CRM's. This can be a major plus for a company just starting out. We started out using Streak as it covered some of the basic emailing options we needed for outreach. Hubspot is another highly regarded option. The important thing to remember with all of these is that they offer basic functionality. That shouldn't be a problem though for most businesses starting out. Once you get a few more customers, though, it's worth looking into paid options.

- **Paid options**

  If you feel that you need more than a free option can offer you, don't worry too much. Nucleus research has found that for every dollar invested in a CRM, the average return is $8.71. The paid field is pretty big and I won't even be able to scratch the surface of what's out there. Instead, I'll tell you about what has worked for us.

  We used Close.io for a while. It was easy to use and had all of the functions that we needed at the same time. The main ones were the ability to track our communication with customers, making sure that we hadn't dropped the ball at any point in the pipeline.

  It even includes email tracking which some more advanced CRMs (Salesforce) don't have. If you are running a small to medium sized business, it is a great option. What we found though is is that this option lacked two things. A usable dashboard and integrations.

  When your sales team is small, you don't need to keep tabs on too many people. You can personally check in to see what they are doing well and what they could do better. As the team gets bigger, you want to be able to see statistics about every part of the sales process in an easy-to-access dashboard.

  As you add more tools to your sales stack, you want them to integrate with your CRM. The study Email Marketing: Get Personal with Your Customers, points out that "The best in class are two times more likely to link automated lead management tools to CRM." This means that you need a CRM which integrates with all of your tools.

Our answer? Salesforce. It is one of the most popular products out there and covers the entire sales process. Also, it integrates with a number of different tools (including Growbots) so that our sales team didn't have to sit around manually entering information.

### Questions to ask before settling on a tool

The tools that you pick for your sales pipeline can be the difference between capitalizing on your sales pipeline and watching your valuable leads disappear. Before you spend a lot of time and resources developing a stack you should ask yourself a few questions.

- **How much do I want to spend?**
  While a tool like Salesforce can give you a ton of data and functionality, do you really need it? A scheduling tool might be a better place to invest your budget as a free CRM like Hubspot might be able to perform all of the pipeline tracking functions you need.

- **What kind of functions do I need?**
  Thrift is important, but it will help nobody if you get a cheap or free tool which doesn't do everything you need it to. In other words, get the best tool you can afford which performs all of the functions you need it to.

- **What mistakes can I avoid?**
  There are a few common pitfalls that everybody runs into when establishing their tool stack

  - **Only testing the new tool on executives rather than the people who will use it**
    Oftentimes end users don't make buying decisions. This may be for the best, but woe is the executive who leaves the users out of the testing process. These tools are supposed to help your team produce better results for you. How can you be sure they will if your team doesn't have a chance to use it?
  - **Not clearly defining what you are going to use your tools for**
    Do you need a CRM for basic data entry or for tracking the progress of your team? Does one of your other tools have a similar functionality to the tool you are considering buying? Remember, don't choose only based on cost. Think about what you need to do and why you need to do it. After all, you don't want to end up paying for a white elephant. Conversely, you want to avoid buying a moped to do the job of a Ferrari.

The important thing to remember is that your outbound channel produces a warm lead. **From there it is up to you to cultivate that lead** so that it can be passed along to your account executives.

## FAQ’s

### What should I do with out-of-office replies?

If you use Growbots, your out-of-office replies should be rescheduled automatically. Of course, they are sometimes worded in a way that is not recognized by the software. On those rare occasions, it is a good idea to skim your inbox and reschedule manually.

### Should I reply ASAP or wait?

You should always reply ASAP. The longer you wait, the less likely it is that you will be able to continue the conversation. According to the *Lead Response Management Study*, if you respond within the first hour of receiving a lead, you are **7 times more likely to make the sale** than if you respond even an hour later. That’s quite a big difference.

CHAPTER 7

# OPTIMIZING THE OUTBOUND PROCESS

Want to go from good to great? Find out what metrics will deliver success. **Included in this chapter:** actionable insights on which metrics are important to making your outbound campaign produce the best results possible.

## IN THIS CHAPTER, YOU WILL LEARN HOW TO:

- Build an equation to predict your revenue.
- Pick the right metrics to pay attention to and tweak for better results.
- Time the delivery of your messages for maximum effect.
- Avoid getting your messages caught by spam filters.

Unlike most other methods, outbound sales is a beautifully simple equation, and this is coming from a student of humanities who said goodbye to math in high school. Your results can be explained like this:

**Cold prospects x warm lead rate x meetings set x meeting attendance rate x sales qualified lead (SQL) rate x average deal size x close rate = revenue**

It can be worked out with a simple pocket calculator and that represents the full complexity your company's entire outbound revenue stream. So, how is this useful to you? Simple, you can predict that when you take 30 minutes a day to contact 200 prospects with Growbots, you will close almost two deals.

If you know the system is working the way it should, you can then get your sales team to work in a predictable manner and produce predictable results. Each step of the process affects the ones that come after them. By tweaking the conversion rate of each step, you can improve your outcomes. So, let's look at how we can tune up your outbound campaign.

**Step 1:** Pay attention to the right metrics
**Step 2:** Time your messages to have the biggest effect
**Step 3:** Make sure your messages are read by their intended recipients

### Step 1: Pay attention to the right metrics

Before we can look under the hood of your outbound campaign, we need to know what we're looking for. These are the most important metrics to track.

**Revenue pipeline metrics**

- Number of prospects contacted
- Conversion/Warm lead rate
- Persistence/Meetings scheduled rate
- Meeting attendance rate
- SQL rate
- Average deal size
- Close rate

**Supporting metrics**

- Open rate
- Data quality
- Reply rate

## REVENUE PIPELINE METRICS

Some of these you can tweak while others should be maintained to be consistent. So how do you get those to work in concert? Let's have a look at each one in more depth:

- **Number of Prospects contacted**
  This is where it all starts. The foundation of your outbound campaign. It also represents the start of your ROI calculation. After all, leads cost money. You need to know that you can make a lot more on your prospects than you spend on them. Your number of prospects forms the most basic input into your outbound sales pipeline equation. The only constraints on this number are your credits and emailing best practices, a topic we will get onto later.

  Since Growbots allows you to save your sales team so much time prospecting and sending out a campaign, they can always use multiple email addresses to maximize their daily output. This means that your maximum daily output can be increased by multiples of 200 as long as you have an active email for each batch of 200 new prospects.

- **Conversion rate/warm lead rate**
  Outside of the number of leads you start with, this is probably the most important metric for predicting how the equation will work. Aaron Ross even believes that this is the most important equation for board members to track after closed business. Why is that? Because your conversion rate represents the culmination of all of the efforts you have put into your outbound campaign. As long as you know the number of prospects you start with and your warm lead rate, you can predict the outcome of the whole thing.

  While it is not the only metric that you can improve, it gives you the biggest opportunity to improve your overall outcome.

  Let me break it down. Our customer success team considers 3.5 percent warm leads to be a good benchmark for a successful campaign. Now that benchmark is by no means universal for all target verticals. As a rule, bank CEOs are less responsive than the CEOs of hotel chains. When a company refines their targeting and messaging, they can reach 2.5 percent warm leads. We have become masters of this in-house. How well do you think we do? 5 percent!

The rest of the equation depends on this metric. So think about it. You can raise your revenue by over a third just by improving this rate from 1 to 2.5%! If you become a real outbound sales ninja, you can more than double your revenues. How cool is that!

So how do you do it? Well, making this rate better is what this whole guide is about. Spend more time on targeting, messaging, and timing. Keep testing your theories and build on the ones that work better. They all contribute to your bottom line.

- **Persistence Rate/Meetings Set**
  Once a member of your team converts a warm lead, it is important to make sure that they don't let it go cold again. It is common for us to see our customers master outbound lead generation only to drop the ball when they need to follow through on nurturing their lead. This is mainly down to persistence.

  If a warm lead doesn't respond after five more messages, send a sixth. A good persistence rate is 45%. If you are only setting meetings with 15 to 20% of your warm leads, there is definitely room for scope improvement.

- **Meeting attendance rate**
  Once your meeting, has been set don't assume that your lead will attend. This is one area where automation tools like Calendly have been really valuable. Being able to set meeting times with one click

and send automatic reminders raised this rate from around 60 to 85% where it has held steady. If this number drops, check to make sure that your scheduling software is working correctly.

- **Sales qualified lead rate**
  What makes a sales qualified lead depends on what you are looking for in a customer. It is worth checking your ICP for reference. By adjusting targeting you can improve your SQL rate but you can also accept a drop to go after larger deal sizes. We have found that a healthy SQL rate is 70-80%.

- **Average deal size**
  You set this as a goal for your account executives. You might want to go after a number of small deals or spend a longer time cultivating larger deals. Whatever you choose, this number can then be used to figure out how much revenue you will probably generate from your pipeline.

  Average deal size also serves as a good indicator of the progress your company is making. Generally, as you build your product, it becomes more valuable and your average deal size goes up.

- **Deals closed/Win rate**
  This number also depends on the value you want from a deal. It should start a bit lower and go up slowly as you become more established in the minds of your customers. That said, the number changes slowly enough that it can be used for the sake of projecting revenue at any given point in time. For us, it has leveled out to around 30-35%. If you drop below this number, you need to go back and coach your account executives.

## SUPPORTING METRICS

These are metrics that don't represent a step in the outbound revenue equation but contribute to predicting value… or not.

- **Open rate**

  The more eyes you get on your message, the more likely you are to get a response. This will, in turn, help your warm lead rate, which is important for predicting your overall results. It should be at least 40% but through tweaking our subject and preview, we have been able to build ours up to 70-80%. You should quickly check it every day. If it drops off suddenly, that means that your email domain has been blocked, probably by a spam blacklist. But beware.

  This is a metric which is often given more importance than it deserves. You will often hear people brag about their open rates, often earned through deceptive subject lines. When treated like this it is the epitome of a vanity metric. Why is that? You don't want opened emails, you want warm replies. Giving an email a flashy or deceptive subject line can give you crazy open rates. Do they translate into a conversation? Not at all.

  Basically, open rate can be a big bottleneck in your pipeline that you want to overcome. Just make sure you remain honest and don't employ any shady practices. You may get a great open rate but in the end, you'll just be shooting yourself in the foot.

- **Data quality**

  This is a metric that should stay consistent throughout the process. Of course, it comes down to your data provider. At Growbots, we pride ourselves on maintaining data quality of 90 to 95%. Considering that 70 to 80% is more common in the industry, it is worth it to look for the highest quality provider you can get. Scrupulous data providers will refund all of the credits you spend on bounced emails. The biggest problem bad data can cause you is getting your domain blacklisted. This can happen when too many of your emails bounce.

- **Reply rate**
  I only mention this so I can convince you that it is unimportant. Reply rate is often bandied about like it is something special. It isn't. All it does is tell you if somebody has replied. Like with any vanity metric, you waste time optimizing your campaign to improve it and that optimization can hurt the metrics which are important. Now what is very important is how many of those replies are positive (warm leads).

---

☞ **Growbots identifies positive replies automatically:**
Luckily you don't have to read through all of your replies to find your warm leads. Growbots identifies them automatically. Using our AI, each of your replies is scanned and sorted. What this means is that you don't have to manually sort through the replies you get. Instead, you are simply presented with all of the warm leads that you receive straight to your inbox. Because the software can recognize the nature of the emails you get, you can easily check your dashboard to see which of your campaigns are performing the best.

---

Now all of these little tweaks and numbers are a bit hard to string together on their own. Let's look at this a bit more cleanly. In this exercise, we are going to assume that your warm lead conversion rate is 5% and your average deal size is 5,000 dollars. For a day's worth of 200 messages sent out from one address the equation works as follows:

**200 (prospects contacted) x 5% (warm lead conversion rate) x 45% (meeting set rate) x 85% (meeting attendance rate) x 70% (SQL rate) x 38% (deal close rate) = 1 deal closed**

That means that for the week of prospecting sending out 200 emails, 30 minutes a day: 5 deals closed x $5,000 average deal size = **$25,000** in revenue!

---

To make your life easier, we have built an interactive outbound sales calculator so that you don't have to go through the entire equation each time you want to predict your revenue. With it, you can see how much impact a change in any given metric makes. You can also use it to model your revenue pipeline and set targets.

---

That is $25,000 you can count on when making other decisions in your business. It also means that you can predict that a new ramped up SDR will contribute to $25,000 in sales every week.

Is an SDR not doing that for you? Well, you can then delve into his or her various metrics. Or maybe he or she isn't being persistent enough, leading to too few meetings being booked. Maybe he or she needs more coaching on how to build an outbound campaign so that their warm lead conversion rate increases.

**The point is that you will be able to easily pinpoint the exact place where there is a problem and fix it, without having to deconstruct your entire sales pipeline.**

### Step 2: Time your messages to have the biggest effect

If there is one thing that automation does to make your life easier, it is delivering your messages when you want them to be delivered. With Growbots, there is no guesswork as you can schedule each one of your messages to be delivered at the right time according to the local timezone. Now you might ask why this is important. Well, it is not so simple. There are two things you need to think about when it comes to timing:

Share:

## WHEN TO DELIVER EACH MESSAGE

To the casual observer, finding the right time to deliver your email is not straightforward. Now, I know what you are thinking. It shouldn't matter what time you deliver email. After all, the message isn't sent in real time. After doing some extensive research we have found that this is not the case.

- The probability that your prospect will open your message is not constant.
- There is a pattern to how your prospect opens your email.
- That pattern is highly dependent on the individual characteristics of the prospect.

Our team of data scientists has completed an extensive study of all of the messages sent with Growbots. We specifically looked at the times that messages were opened, and from that developed a model to determine how likely it would be for a message to be opened, according to when it had been sent. The volume of insights that can be gained from this model are almost too many to mention so to help me explain them to you, I would like to introduce you to a buyer persona named Charlie the CEO.

Charlie is the CEO of a technology company based in North America in the PST timezone (think San Francisco), founded after 2010. When we look at the times a message sent to him is most likely to convert, we get this chart:


Two initial points can be deduced from this chart

- The probability that he will open your message is not constant throughout the day and week
- There is a pattern to when he opens your email

Let's take a closer look at what we see here. This chart represents the probability of Charlie sending a positive response, based on when you send your email to him. A few things jump out. The low points of the chart occur between 6 and 7 AM when, being a Silicon Valley early riser, he has cleared out the previous night's emails. There are also two peaks. The first is on Tuesday around 11:45 AM and the other is on

Wednesday around 11 AM. From then on, the peaks taper off for the rest of the week. Clearly, he is less receptive to emails sent after he leaves work the night before but more receptive to an email sent when he has gotten his morning work done.

But it all changes when we put Charlie in the CET timezone (Paris).


Probably the biggest thing that you can see is that he is most willing to respond in the middle of the week, on Wednesday. His peak response time is also earlier, at 9:15 AM. As a European, Charlie gets to work a bit later but is most responsive to emails received when he is clearing out his inbox in the morning when the week is already in full swing.

So, you are probably thinking that this all sounds nice but that it doesn't help you at all. Well, we look through a number of other situations and found that people in the US and in Europe work in a different way, which affects their probability of replying. After all, Charlie in the US starts later and then tapers off pretty quickly.

In comparison, Charlie in Europe starts earlier but is not as inconsistent during the day. Charlie in Europe also tapers off during the week more than Charlie does in the US. Clearly, the country makes a difference.

The best time to email American Charlie would get you 1.5% fewer positive responses from European Charlie. Nailing timing can mean increased revenue down the line.

### Always be testing

**One of the most important things to remember is that you should always be testing your assumptions.** All of the information in this guide is the result of regular experimentation and testing. The sales landscape is constantly changing. You see, in our experience, a campaign will work for 6 to 8 months but then stop being effective, sometimes rather abruptly.

To counter this, we generally devote 25% of our campaigns to new ideas we are trying out while giving over the other 75% to approaches we know currently work.

This is simply because people's attention is a moving target. What was new and interesting today will be less arresting after a recipient has seen that approach 20 times.

Since it takes a bit of time to develop and test a suitable replacement, we are constantly testing and verifying new approaches so that a new one can be instituted as soon as the old one proves to be no longer effective.

Here are some tips about keeping your outbound channel running smoothly:

- Try different verticals, sizes, ages, etc.
- If you aren't having luck using the direct approach, a top-down or bottom-up referral may give you a better return.
- Keep an eye on positive referrals. Is it often the same position? This is probably the real decision maker.
- Try different language (vocabulary, formality, emphasis on information/benefits) with different job titles and see how they respond.

The biggest takeaway from the optimization process should be that you should always be running controlled experiments to find out what works best. To do that it is important to keep a close eye on metrics and respond when you stop getting the kind of results you expect.

### Step 3: Make sure your messages are read by their intended recipients

Earlier I mentioned how getting caught in a spam filter could imperil your entire outbound channel. The first thing to remember is that targeted email outreach is not spam. Therefore, it is important to distinguish the two. How do you do that? A good place to start is with your content.

## CONTENT

If you have read this far, you will have probably picked up on the fact that there are things you can change about your outbound campaign and things that stay the same. Of these, the most variable component of your outbound campaign is the content of your messages. The thing is that spammy content doesn't only trip up spam filters, it also hurts you in the eyes of your prospects. So let's look at what to avoid in your messages. You can find these tips and more in this article from Hubspot.

- **Content that will trip the spam filter:**
  - **All caps/irregular font size**
    Use too big, too small, or irregular font sizes and you'll trigger spam filters. Spammers are known for hiding text in emails using tiny font sizes or for using huge font sizes in their offers. Keep it simple with an 11-point, Arial (or any legible) font type.
  - **Invisible text**
    Invisible text is used to sneak hidden elements past the reader. Don't deceive your reader!
  - **Trigger words**
    Spammy words like Viagra, Free..., Double your..., and Cash... set off the spam filter. You can find a much longer list here.
  - **Forms, attachments, or rich content**
    These can be used as an opening for viruses and are usually caught by the spam filter.
  - **Low text to link ratio**
    Spam tends to link to things that would normally be caught by the filter. Lots of links without text to back them up will trigger the filter.
  - **Low text to image ratio and large image size**

Spam can use pictures of text to say a thing that would normally be picked up by the filter. Therefore the filter is suspicious of a lot of pictures without much text.

- **Content which your reader might perceive as spam:**

  - **Messages focused on your needs, not theirs**
    Your customers will only respond to solutions that address specific needs that they have. Rely on your ICP and buyer persona rather than the feature list for your product. You can also ask them about their needs. Remember, outbound which is relevant and can provide value to the recipient will get you noticed. An email listing all of the things you can do is spam.

  - **Multiple fonts, type settings, and colors**
    Consistency is your friend. We all copy bits and pieces of our emails from time to time. If you're copying some text from a sale template, make sure to first paste without formatting and then ensure your font, type, size, and color is the same everywhere.

  - **Content that is too long**
    We all love novels but not when we are trying to clear out our inbox. The only thing that needs to be in the email are the basic points that you are making.

  - **Complex arguments**
    Your argument in a cold email should be easy to understand and act on. Remember you only have 4 sentences to make your point. Write an argument that is clear, direct, and unconditional.

  - **Content from a company without an address**

Your company's address lends you an air of legitimacy that entities without physical locations just do not possess. A good place is under your signature at the end.

- **No opt-out of further emails**
  Opt-outs give the sender control. In their book *The Rebel's Guide to Email Marketing: Grow Your List, break the Rules, and Win*, DJ Waldo and Jason Falls point out that with an opt-out link, the customer feels in control and are more likely to trust your message, keeping your open rates strong. Leave a simple P.S. at the end offering them the opportunity to opt out. In Growbots, you can do this easily as an unsubscribe link through a custom field. In addition to maintaining your reputation with your sender, this is a legal requirement in most countries and is recognized by a spam filter.

- **Opt-out requests which aren't honored**
  If you fail to honor their request, they will think you are a spammer. Make sure you stop sending emails in a timely manner. This is common sense thing to do.

- **Messages that have not been proofread**
  Mistakes look sloppy and suggest that you don't think that the customer is very important. Look over your email before you send it. You can also use a tool like Grammarly to check for mistakes.

### Step 4: Make sure you follow sending best practices

It is worth checking your content against these suggestions. But guess what, you can write the best content and still end up being blocked by spam filters. How is that? If you run afoul of good sending practices, your domain can be blocked rendering your campaign useless. Here are some tips to follow to maintain a good sender score.

- **Don't send more than 200 emails from one email address a day.**
  We are specifically talking about cold emails. If you appear to be sending out a ton of emails to new recipients, spam filters can get suspicious. 200 a day is a good rule of thumb but the limit can vary. A way around this is to maintain multiple addresses. Just be careful when you open a new address. If you start an outbound campaign from a new mail address, it can send up red flags. Instead send a number of messages from the new address back and forth with friends and work colleagues first so that it develops a good reputation.

- **Go for the best data quality available**
  Growbots prides itself on having the highest data quality out there, with 90-95% of the email addresses we provide verified and up to date. If you use a less up to date data provider, you can get stuck with rates lower than 70%. The more your emails bounce, the worse your sender reputation gets.

- **Avoid blacklists**
  These are lists set up by spam filters of spammy domains. And watch out, they talk to each other, so if you get on one you will soon be on a few. If your open rate plummets, you probably got on one of these. You can check to see which one it is by using one of these services: DNSstuff, MXToolbox, or Return Path. Once you know

which one it is, you can approach it individually and find out how to get off. It is better to do this sooner rather than later as the process can take a long time.

### FAQ's

**Should I reply to negative responses?**
Yes, but don't overdo it. I can be a good idea to send a simple thank you for their answer. In this thank you, you can leave open the possibility that you will be available if they need your product in the future. After this, it is best to stop contacting them so as not to be spammy. Of course, if your prospect is annoyed by your emails, it is not a good idea to contact them again.

**Should I reach out to prospects who haven't replied after a few months?**
Certainly. As we explained in the writing section, it is best to contact the prospect again after about a month with a new set of messages.

CHAPTER 8

# IT'S TIME TO ACT

You have the knowledge. It is time to go out and make your revenue predictable. Find out how.

It should be clear by now that it is time to start outbound. Even if you have other lead channels, you need to think of outbound like a machine. All you need to do is set it up and turn it on. As long as you keep it oiled, it will keep purring away regularly producing new leads. The main thing is that you no longer have to worry about leads and revenue. They will take care of themselves.

What could you be doing with the time you now have since you started your automated outbound channel?

- **Focus on closing**
  The only thing better than making new customers aware of your product is getting them to buy it.

- **Scale up your sales system**
  Now that you have the tools, start to get more out of your sales team. We have found that a full suite of automation tools triple the performance of somebody doing sales development.

- **Sleep well at night**
  Are your numbers keeping you up at night? Do you find that you aren't spending enough time with your family because your team is always fighting to meet its revenue targets? With outbound, you can meet your targets without bringing your work home with you.

No matter how many other lead channels you have, outbound will always pay for itself by reliably producing high-quality leads. There are just two things to remember that will make your outbound campaign shine.

1. **Always be testing**
   We are only able to tell you about what works because we tried it out in the first place. Campaigns only have a 6 to 8 month shelf life before they become stale. If you build trying out and implementing new ideas into your process, you will be able to stay ahead of the game.

2. **Automation tools are essential**
   Your employees' time isn't cheap. Don't waste it making them do outbound manually. Instead give them tools that will maximize their output. We have found that automating prospecting, outreach, following up, and persistence boosts the efficiency of our customers' sales teams three times over. This means that your current team of three people can do the same work as 9 without having to hire or onboard anybody extra.

If you have any questions or want to learn more about how your company could benefit from targeted outbound email sales, sign up for a demo with Growbots.

CHAPTER 9

# CHEAT SHEET

This is for those of you who don't want to read the entire Ebook before getting started on your campaign. In this section, we have outlined your instructions so you can find the key actionable pieces of information you need to get started.

If at any point you need to jump to a piece of information, you can use this chapter as an index, since the page numbers are next to each piece of information.

## TARGETING YOUR CUSTOMERS

- **You need a targeting framework to create a targeted campaign** p. 11
  - By targeting, we went from 1% to 2.5% conversion

- **By targeting your campaign, your improved conversion rates become predictable**
  - Targeted customers are by design more responsive to your inquiries p. 12
    - The leads that you convert are more valuable
    - According to David Skok, Hubspot board member
  - When you don't target, you risk alienating future customers
    - John Barrows

- **The Jobs to be Done framework is essential for targeting your outbound campaign** p. 13
  - Jobs to be done helps you understand who you can help the most and how to appeal to them
    - It is a framework for understanding the reason why customers make purchases

- **YOU CAN USE JOBS TO BE DONE TO:**
  - **Identify the situation where your solution helps the most**
  - **Predict the outcome that your customers want to get from using it**
  - **Predict which customers are in a situation that you can help them out of**
  - **Convince your customers that you are the best solution to solve their problem**

- **Step 1: Find out what job your customers hire your product to do** p. 14
  - Your customer hires your product to solve a problem that they have
    - Milkshake story
    - https://www.youtube.com/watch?v=VmbSpTJXozk
    - Bank loan example
  - Sometimes you don't expect the job your product does
    - Intercom map
    - https://www.intercom.com/books/jobs-to-be-done
  - How can I find the information I need to find out about jobs to be done?
    - The Innovator's ToolKit
    - Evaluate what the market's needs are
      - **A. Look at current customers** p. 16
        - Have already proven to work for you
      - **B. Define your competition and analyze their customers** p. 16
        - You are competing on jobs, not products
          - Textbook example

- Ask yourself whose profits are going to go down when mine go up?
  - Those are your true competitors
  - Mainframe example
    - Alan Klement in *When Coffee and Kale Compete*
- Figure out what kinds of jobs your competitor's customers hire them to do

**C. Define the customers you want and analyze them** p. 17

- Find out if more valuable customers have different jobs to be done

**D. Talk to everybody who has contact with the customers** p. 18

- Find out which of the ICP criteria they cite the most

**E. Conduct interviews to find out specific jobs to be done** p. 18

- Find subjects through linkedIn or vertical specific sources like Angellist for tech startups
- Basic questions
  - From the American Press Institute
    - How do you make money?
    - What are the things about running your business that keep you up at night?
    - What are some things ("jobs") that you are having problems getting done?
    - Under what circumstances do you usually try to do these things?
    - What do you currently use to help you?
    - What other options have you considered?
    - Why did you use or reject these?
    - How would you describe the perfect solution?

        - What are the most important characteristics of this solution?
    - If you want to go deeper, you can check out this set of interview questions tailored for SaaS products
        - Can be used for other B2B purposes
        - Provides interview tips as well
        - Helps you think about how your product compares to others

- **Step 2: Turn your research into a job story** p. 20
    - A job story is the simplest way to express your job to be done.
        - https://jtbd.info/replacing-the-user-story-with-the-job-story-af7cdee10c27

            - **When ______ , I want to ______ , so I can ______ .**

            - When
                - Describes situation where the customer will need your product
            - I want to
                - Describes the action your customer wants to take
            - So I can
                - Describes the outcome your customer wants
            - Example: Engineering interview
                - Creates job story
                - *When I design a project, I want to be able to make collaborative changes easily, so I can deliver the completed design according to schedule.*
            - Other job story examples

- **Step 3: Find the information you need to build an ideal customer profile** p. 22
  - Build an ICP to make your user story actionable
    - An ICP is a representation of the kind of customer you want to sell to
      - "It's basically a description of a fictitious organization (company, government agency, non-profit organization …) which gets significant value from using your product/service, and also provides significant value to your company."
      - Steli Efti
    - How does it help outbound? p. 22
      - Because it is a super targeted market segment
        - Focusing on a market segment gets better results
          - "Success in planning marketing activities requires precise utilization of […] market segmentation as components of marketing strategy."
          - https://archive.ama.org/archive/ResourceLibrary/MarketingManagement/documents/9602131166.pdf
          - You only have a limited number of resources with which to attract customers, so spend them on the customers who will give you the most back for your efforts
    - Ask questions of the information you have used to create your job story to create your ICP (from Steli Efti) p. 23
      - What verticals work best for you?
      - What size companies are most responsive to your product?
      - Do you customers tend to cluster in certain locations?
      - What technologies do your customers use?
      - How long have your customers been around?
      - What structure does the company have?

        - What special conditions are there for your product?
        - What red flags appear with customers who don't buy your product?
    - Decide what makes a customer valuable p. 24
        - You can make a job story for the customers
            - When I want to increase my sales velocity, I want a customer who does not have a long purchasing process, so I can close the sale quickly.
        - Lincoln Murphy considerations for picking customers
            - The likelihood that they will buy what you are selling
            - The value of the deal
            - The number of resources you will need to commit to close the deal
            - How responsive you need them to be once they have bought your product or service
            - How many resources you will need to commit once the customer has purchased your product
            - How influential the customer is, either to evangelize for your product or hurt your reputation when they are unsatisfied.

- **Step 4: Match your ICP criteria to your job story** p. 26
    - Focus on the situation (the "when") of your job story
        - Find which criteria match companies that get into that situation
        - This is not all of the people you can sell to, just ones you know you successfully target
        - Example of a book printer p. 26
            - Customer job story
                - *When I need to publish a mass market book in the United*

*States, I want to be able to print it in both a hardcover and mass market paperback format, so that I can make it as widely available as possible.*

- Prospecting job story
  - When I need to find new customers, I look for customers who will make multiple printings of one edition, so that I can always produce at full capacity.

- ICP
  - Vertical: Publishing
  - Location: The United States
  - Size: over 100 employees
  - Special conditions: mass market
  - Red flags: Academic publishers, special editions

- Example of a marketing automator p. 28
  - Customer job story
    - *When I need to optimize my inbound pipeline, I want to clearly track my leads through the pipeline while keeping an eye on my metrics, so that I can convert more leads.*
  - Prospecting job story
    - *When I need to scale my revenues, I want to take on new customers who I can service through my European customer success team and have a similar way of doing business to us, so that I can lower my churn rate*

- ICP
  - Technologies: marketing automation (Hubspot, Marketo)
  - Special conditions: must do inbound marketing, up to 5 users (limit of the tool), must speak English, French, or German
  - Location: Europe, Africa
  - Red Flags: Angola, Mozambique, (mostly speak Portuguese), Agencies (high churn rate)

- **Step 5: Make your job story actionable for messaging by creating a buyer persona** p. 29
  - Your buyer persona is a list of specific pain points, motivations, of the person you write your message to, along with the jobs that you do for them.
    - "You are going to have different personas that are going to hire your product for a job, but they're going to talk about it in a different way."
      - Intercom's Matt Hodges
    - A CEO and a specialist might have different pain points and jobs that they need to be done.
  - Use the information from your job story and job story research to build your buyer persona
    - Research what kind of person fits the pain point, solution, and outcome.
    - Zapier example: p. 30
      - **Job story (user)**
        - *When I receive a support request, it needs to be automatically sent to all our tools, so that I can act on it*

*without wasting time on tedious admin.*

- **Buyer persona (user)**
  - **Title:** customer success specialist, customer hero, customer service representative
  - **What value we deliver for them:** They don't have to enter data into individual applications
  - **What objections they have:** don't want to go through a time-consuming implementation process
  - **How do your features perform the jobs they need to be done:** It's easy to automate tedious tasks automatically, interface is easy to navigate cutting down on time needed to set up tasks.

- **Job story (decision maker)**
  - *When we receive a support request, it needs to be logged and my team needs to be notified across our whole tool stack so that I never have to worry about a support request going unanswered.*

- **Buyer persona (decision maker)**
  - **Title:** VP of customer success, head of customer service, customer service director
  - **What value we deliver for them:** They can automate their team's processes, can ensure no requests get dropped
  - **What objections they have:** don't want difficult onboarding, don't want any lag between integrations
  - **How do your features perform the jobs they need to be done:** 750 integrations including their full support stack, full support means that there is no downtime.

- **Job story (c-suite)**
  - *When we receive a support request, It needs to be acted on immediately and cost effectively, so that we can maintain our customer's loyalty.*

- **Buyer persona (c-suite)**
  - **Title:** CEO, COO, CTO
  - **What value we deliver for them:** They can build their software stack organically, in an integrated manner, works across every team it the company
  - **What objections they have:** needs to be cost effective, can't drop any integrations
  - **How do your features perform the jobs they need to be done:** team pricing plan, 750 integrations including all software used by the company

- You can include more criteria if you need to

- **Step 6: Start targeting**

## FIND THE BEST WAY TO APPROACH YOUR PROSPECT

- **Step 1: Decide who you want to convince** p. 38

- **Step 4: Use advanced targeting to get a closer match to your ideal customer** p. 45
  Use advanced criteria like custom criteria and technologies to get a better fit for your ICP.

## WRITING YOUR CAMPAIGN

- **The goal of the campaign:** p. 50
  - **Spark enough interest in your prospect that they want to talk to you again.**
  - Even a simple noncommittal message of "tell me more" is a win for you.
- **All of the techniques mentioned come from testing that we have done**
  - They have contributed to our 7% conversion rate
- **Steps:** p. 51
  - **Step 1:** Write the Subject line of the first email so that people open it.
  - **Step 2:** Write the First paragraph of the first email to develop a rapport with your recipient.
  - **Step 3:** Write the Second paragraph of the first email to make your pitch.
  - **Step 4:** Write the Call to Action of the first email to tell your recipient what you want them to do.
  - **Step 5:** Write the Footer of the first email.
  - **Step 6:** Write the P.S. of the first email.
  - **Step 7:** Write your three follow-ups (short, long, short).
  - **Step 8:** Write a new thread for your recycled prospect (long, short, long).

**Tips:** p. 52

- Take out the persona you are targeting and write to it like a person.

- **First email:** p. 53
  - **Step 1: Subject line** p. 53
    - Simple (recipient's name) x (your name) is the best
      - Mark Smith x Stanley Jones
      - 64% of people say they open an email because of the subject line
      - 42% looked at the sender first before opening
      - Subject lines with 2 words or less have a 53.7% chance of being opened
    - Use the recipient's name
      - personalized subject lines are 22.2% more likely to be opened
    - Don't be deceptive
    - Avoid
      - Riddles
      - "Quick question"
      - Sounding like a marketer or another newsletter

**Tips:**

- Write something interesting p. 58

  - **Step 2: First paragraph** p. 56
    - It only takes 3 seconds to make a good first impression
    - It should:

- Find common ground with your recipient.
- Be relevant to the recipient.
  - First impression formed based on value
- Be personalized within the first paragraph.
- Have content that comes from a business context.

---

**Tips:**

- Write something personal. p. 87
- Use a conversational tone. p. 88
- Prospects can see the beginning of your first paragraph in the preview. p. 68
  - 24% of people look at the preview first when they think about opening an email.
  - Don't start with an obnoxious or boring declaration.

---

- Personalization for Pro's: p. 64
  - Do research about the individual prospect and use it to support the information in your buyer persona.
    - Personalization took us from a 2.5% to 5% conversion rate.
  - Always use personal information rather than company information.
  - Automate adding research to your campaigns in Growbots using the custom field feature.
- **Step 3: The second paragraph** p. 69
  - Is where you show the benefit of your product.
  - It makes a seamless transition from the intro.

        - Talks about value/benefits, not features.

---

**Tips:**

- Find ways to make yourself more human. p. 89
- Important: Always use the second person p. 73
    - Talk about the customer (you, your, etc.) instead of yourself (I, we, us, etc.)

---

    - **Step 4: Call to Action** p. 74
        - Tell the prospect exactly what you want them to do.
        - Be as specific as possible.
        - Don't ask for too much.
    - **Step 5: Footer** p. 79
        - Always include one
        - Name, title, phone number, and link to your website
    - **Step 6: P.S.** p. 80

      90% of people read the P.S.
        - Good place for an external link

---

**Tips:**

- Don't use many links. p. 90
    - The paradox of choice means that people will be less likely to click on your call to action

---

- **Follow-ups**
    - **Step 7: Write your three follow-ups (short, long, short)** p. 81
        - It is important to send follow-ups as only 54% of your replies

come immediately after the first message sent

- 54% after the first message
- 25% after the second
- 12% after the third
- 6% after the fourth
- 3% after the rest

- Approaches to crafting follow-up emails p. 82
  - The sequence of approaches: p. 82
    - The first follow-up: is a quick question as to whether they received your first message.
    - The second follow-up: should add value. This is a good time to include social proof.
    - The third follow-up: this is a quick reminder that you are interested in talking with a short piece of info. This is a good time to add a link in your P.S.
  - The short approach: p. 83
    - Quick reminder
    - Can add value in P.S.
    - Use the "Sent from my iPhone" trick.
  - The long approach: p. 85

    Explain benefits in detail
    - Good place for numbers/social proof

**Tip:**

- Use appropriate language. p. 88
- Your whole campaign needs to be a consistent flow, not a series of stand-alone messages. p. 87
- People like it when you back-up your statements with numbers in headlines and content. p. 90

- **Use social proof** p. 91
    - Use social proof
        - It is important because:
            - Your customers don't know if your product has worked under real life conditions.
            - You are the only person providing them with verifiable information.
            - Your product might work for some companies but not theirs.
        - Social proof can include:
            - The names of killer brands or companies that you have helped similar to the one you are targeting.
            - The number of customers you have.
            - Examples of how you have helped companies in the past.
            - Complete case studies of how your customers have been able to succeed using your product or service. Here's one we use.
            - Awards and prizes.
            - Positive review from sites like G2 crowd.
            - One pagers.
            - Video explainers.
            - Infographics.
    - **Step 8: Write a new thread for your recycled prospect (long, short, long)**
        - If you don't get any responses after the third follow-up, wait a month and then start a new campaign in a new thread.

- ▫ You should send about 3 new follow-ups p. 93
- ○ Sample Frequency p. 94
  1. **First message**
     (If you choose to use the I forgot to mention trick, send it 1 hour after this first message)
  2. **First follow-up:** 3 days after the first message
  3. **Second follow-up:** 5 days after the first follow-up
  4. **Third follow-up:** 7 days after the second follow-up
     (If your prospect doesn't reply after the third follow-up, wait for three to four weeks to let your message sink in)
  5. **First message of new thread:** 3 to 4 weeks
  6. **Second message of the new thread:** 5 days after the first message in the new thread
  7. **Third message of the new thread:** 7 days after the second message in the new thread

- ○ A sample campaign p. 95

## WHAT TO DO WITH A WARM LEAD

- **Remember:** p. 108
  - **A warm lead is somebody who wants to learn more. That is it. You have not closed the sale yet.**
  - Your customer has only just learned that there is a solution to their problem.
  - If you can sell them on the value that your product offers them, you will be their first choice to get that value

- **Step 1: Evaluate the lead** p. 111
  - Decide what kind of persuading they will need

- **Step 2: Be persistent in converting your lead** p. 113
  - The Growbots 8 rules of persistence
    1. Reply to every message (excluding people who are not interested - you don't want to take up any more of your time or theirs). Even a short answer is a win.
    2. Never stop sending follow-ups because you don't know how many it will take to convert somebody who has shown interest before.
    3. Make hay while the sun shines. Once you get a message, reply ASAP (preferably call immediately), while the prospect is still new and interested. If you wait a few hours or days, they might forget you exist.
    4. Your follow-ups will be frequent in the beginning (a reply to an email, a break for 1-2 days and a follow-up, 2-3 days and another follow-up, and so on), but with time, they will become less frequent. Pay more attention to and follow up more frequently with your more invested leads.
    5. Don't bury your reply in a long list of follow-ups.
       a. If a lead doesn't reply to 2-3 follow-ups, write another follow-up as a reply to his or her positive message, not as a reply to our 3rd follow-up.
       b. If you do it this way, he or she sees their positive response right below your first follow-up, not a long series of follow-ups he or she sees.
       c. **Take note:** if one of the follow-ups was an extensive answer to a question, send a new follow-up as a reply to

this message (the follow-up with that answer).

6. If a lead has any questions or doubts, you have to address EACH of them, clearly and completely, even if some of your answers are negative. A negative answer is simply an opportunity for you to persuade your lead that this is not a disqualifying concern.
7. If you addressed a doubt and the lead does not reply, this means you haven't actually resolved their doubt. In the next follow-ups, you need to address it again, this time even more thoroughly.
8. Have your team keep track of the way that they answer questions and address doubts. That way, the next time a lead asks that question or expresses that doubt, your sales reps will know how to respond.

- Hold a meeting or demo
- Have documentation prepared to help you make your case:
  - Use your ICP/buyer persona to help you match info.
  - Don't stop sending reminders until you get a response.

---

**Tip:**

- Always address every single question or objection you get from a customer, even if it is negative. p. 112

---

- **Step 3: Persuade your lead using the information in your buyer persona** p. 114

- It provides you with information about what kinds of issues and concerns the customer will have

- **Step 4: Optimize your responses using automation tools** p. 115
  - Top performing companies use automation tools more often than underperforming companies
  - Tools you will need
    - Email accelerators: p. 116
      - Connect email to your CRM (more on that later)
        - Cirrus Insight
        - Mixmax
    - Email follow-up automators: p. 117
      - Allow you to automate follow-up responses to your warm leads
        - Followup.cc
        - Rebump
        - Vocus
    - Always make your follow-ups personal
      - There is a difference between "lightly personalized" and "personal."
        - Lightly personalized only means adding the recipient's name
        - Personal means speaking directly to the concerns and needs of your recipients
        - Highly performing companies send out 28% more personal messages than poor performing companies
    - Check your timing
      - Use your automator to send your messages at the best time of

day to be opened

- Important things to remember about follow-ups:
  - Always customize
  - Check timing of delivery like you would for your cold campaign
    - Always reply immediately
- Meeting scheduler: p. 118
  - Prevents you from losing people while scheduling your meeting
  - Also reminds people about your upcoming meeting
  - We find Calendly works very well
  - Gave us a 24% bump in meeting attendance
- CRM p. 119
  - Tracks every touch point you have with your customer including:
    - Initial positive replies
    - Follow-ups
    - Lead qualification
    - Sales
    - Aftersales
  - You want a CRM which is
    - From Business News Daily
    - Cloud based
    - Secure
    - Easy to use
    - Supports third party integrations
    - Relevant to your industry
    - A good fit for the size of your company but can scale if it needs to
  - Free options
    - Streak

            - Hubspot
        - Paid options that we find work well
            - For every dollar invested in a CRM, the average return is $8.71
            - Close.io
            - Salesforce
                - Has more integrations
                - Successful companies 2 times more likely to link automated lead management tools to their CRM
    - Questions to ask before settling on a tool p. 123
        - How much do I want to spend?
        - What kind of functions do I need?
        - What mistakes can I avoid?
            - Only testing the new tool on executives rather than the people who will use it
            - Not clearly defining what you are going to use your tools for

## OPTIMIZING THE OUTBOUND PROCESS

- Outbound sales is incredibly predictable, allowing you to calculate your revenue purely based on your inputs. p. 127
- You can use this equation to calculate revenue: Prospects contacted x warm lead conversion rate x meeting set rate x meeting attendance rate x sales qualified lead (SQL) rate x average deal size x close rate p. 127

- **Step 1: Pay attention to the right metrics** p. 128
    - Number of prospects contacted: p. 129
        - The number of targeted cold prospects you generate
    - Conversion rate/warm lead rate: p. 129

    - The number of positive or neutral responses you get as a result of your outbound campaign
    - As you improve this number the rest of your campaign will improve
    - A good campaign starts around 1% but can go as high as 6%
        - We got 5% consistently after 80 thousand emails
- Persistence rate/Meetings set rate: p. 130
    - The number of meetings you set from your warm leads
    - In our experience, 45% is a good rate. If it is lower, there is scope for improvement
- Meeting attendance rate: p. 130
    - This is a measure of how good your calendar tools are
    - Automation tools like Calendly took this rate for us from 60% to 85% because of automatic reminders.
    - If it drops, check your automation tools to make sure they are working correctly.
- Sales qualified lead (SQL) rate: p. 131
    - This is the percentage of meetings that will lead to a sale.
    - It can be adjusted depending on the size deals you want to make.
    - We have found that a more selective rate is around 60% while a broader rate is around 80%.
    - Once you pick a strategy, this rate stays the same.
- Average deal size: p. 131
    - Depends on your product and how selective you are with SQLs
    - Is predictable once you decide on SQLs
- Deals closed/Win rate: p. 131
    - This is the number of sales you close
    - Depending on the parameters you set for your Account Executives, this can be anywhere between 5% and 50% (we

have leveled off at 35% of SQLs)

- Supporting metrics: p. 132
  - Open rate:
    - Important for seeing if people are reading your messages
    - The more people who read your email, the more warm leads you will get
    - You can improve your subject line and preview to get this as high as 70%-80%
    - It is important not to use deception to improve this metric
    - Deceptive subject lines will not convert into warm leads
  - Data quality:
    - Good data means more of your emails get delivered to potential customers. This is because you only contact decision makers, not random people.
    - Bad data also leads to email bounces, hurting your sender reputation, and causing you to be blacklisted by spam filters.
    - Should be at a safe rate like Growbots, at around 90%-95%.
  - Reply rate:
    - Replies are not important, positive replies are.
    - Growbots tells you automatically which of your replies are positive, out-of-office, and negative. That way you can easily focus on the warm leads who want to learn more about your product.

- **Step 2: Time your messages to have the biggest effect** p. 135
  - The probability that your recipient will open your message is not constant.
  - There is a pattern to how your prospect opens your email.
  - That pattern is highly dependent on the individual characteristics of the prospect.
  - What we found from our study of timing:
    - Our North American example tended to be the most open

to responding to emails sent right before noon (11:45 am on Tuesday and 11:45 AM Wednesday).
    - Our European example tended to be the most open to responding to emails sent earlier on Wednesday morning (9:30 am).

- **Always be testing:** p. 138
  - Trying to catch people's attention is a moving target.
  - A campaign can become stale after 6 to 8 months because too many people start copying it. This leads to a quick drop off in results.
  - 25% of the campaigns that we send out are ones that we are testing while the other 75% are ones that we know currently work. This prepares us for when our current campaign stops working.
  - Some tips for testing:
    - Try targeting campaigns for different verticals, company sizes, etc.
    - If you aren't having luck using the direct approach, a top-down or bottom-up referral may give you a better return.
    - Keep an eye on positive referrals. Is it often the same position? This is probably the real decision maker.
    - Try different language (vocabulary, formality, emphasis on information/benefits) with different job titles and see how they respond.

- **Step 3: Make sure your messages are read by their intended recipients** p. 139
  - Targeted outbound that provides value is **not spam**.
  - Certain content might still trigger spam filters and should be avoided:
    - All caps.
    - Mistakes in Punctuation, Symbols, Typos, and Grammar.

        - One Font, Type, and Color.
        - Invisible Text.
        - Trigger Words.
        - Forms, Attachments, or Rich Content.
        - Low Text To Link Ratio.
        - Low Text To Image Ratio And large Image Size.
    - Certain content might cause your reader to mark your messages as spam and is best avoided:
        - Messages focused on your needs, not theirs.
        - Content that is too long.
        - Complex arguments.
        - Content from a company without an address.
        - No opt-out of further emails.
        - Opt-out requests which aren't honored.
        - Content which is not proofread.

- **Step 4: Make sure you follow sending best practices** 
    - Don't send more than 200 emails from one email address a day to maintain sender reputation.
        - Sending more can get you put on a blacklist.
    - Go for the best data quality available.
    - Avoid blacklists.
        - Use DNSstuff, MXToolbox, or Return Path.

## IT'S TIME TO ACT

- As long as you keep the important metrics constant, your outbound revenue channel will keep producing revenue in a predictable manner.
- Since you no longer have to worry about revenue you can:
  - Focus on closing
  - Scale up your sales system
  - Sleep well at night
- Just remember:
  - Always be testing
  - Automation tools are essential to improve productivity and performance

So go out now and sign up for a demo with Growbots. It will be your first step towards hassle free revenue.

# ABOUT THE AUTHORS

**Greg Pietruszynski** - CEO and Co-founder of Growbots, the first all-in-one outbound sales platform. Serial entrepreneur, automation freak, and growth geek.

**Chris Zawisza** - Head of Demand Generation @ Growbots, laser-focused on the growth of Growbots' customer base. Always eager to brainstorm and explore new ideas.

**Lewis Stowe** - Content Marketing Specialist @Growbots, passionate about creating inspiring, helpful, 10x content which gets new ideas and insights to as many people as possible.

**Growbots** is an all in one solution for driving predictable growth. With our AI based platform, anyone who needs to generate leads, from sales to marketing, can reach out to hundreds of potential customers in minutes. The rest of their day is freed up to interact directly with customers and create more business, instead of slogging through the tedious and time consuming process of prospecting manually.

Growbots uses machine learning to provide you with the best data available on the market, optimize your targeting, run your campaigns, and manage your inbox, so you can focus on talking to potential customers.