



Step-by-Step Guide to

Using Email for Sales Prospecting

Find out how to think like your target audience and get them to convert.

**BOOK
YOUR
DATA**



USING EMAIL FOR SALES PROSPECTING: *How to do it correctly*

Email has become a primary prospecting tool used to move leads through the sales funnel. Engaging your audience through email is a cost-effective way to gain valuable insight into how they interact with your brand, content and product. Unlike cold selling methods that drain hours and resources, your manual labor is better spent on tracking measurable results that impact your sales approach, and ultimately, your bottom-line.

Email campaigns can streamline sales prospecting, and maximize your return on lead lists by helping you to:

Build Relationships

Email prospecting can actually help warm your leads and establish brand loyalty over time. While some believe that cold calling helps establish a personal connection, it can actually be counterproductive to contact leads who have not yet received an email from you. By sending relevant emails over time to your leads, you give them the opportunity to engage and interact with your brand when they're ready.

Build the Brand

Leads will not listen if they're not ready to listen. This is why it normally takes 5-8 touches to get a response from them. Emailing allows you to develop your story over time, providing relevant information and content that will establish credibility for your product, encourage brand recognition and engagement.

Build an understanding of your target audience

Tracking your email open rates, content downloads and conversions will help you gain a better understanding of what engages your leads. You can create controlled tests to discover how different subject lines, content offers, and incentives are received by your audience. Not only will this help to refine your messaging, it will also help you to refine your target audience overtime.

Before we move on, it's important to understand the difference between email marketing, and using email for sales prospecting. Email marketing is mass communications from your company to individuals who have opted in to receive messages from you in some way. Sales prospecting is one-to-one communication to individuals you identify as valuable targets for your company.

Next, we'll identify the steps you'll need to take to implement and maintain an effective email campaign that helps you turn your leads to prospects, and your prospects to customers.



STEP ONE: Define and Segment Your Target Audience(s)

If you set up a lemonade stand on a hot day, people will line up. Knowing who to target, and why you're targeting them is the first step in establishing an effective email campaign. What problem are you solving in their lives to make them want to buy your product?

Sending out emails in mass volumes does not necessarily increase your return on engagement. Sending personalized emails to a targeted audience will. In order to define your ideal customer, you'll need to identify your target audience by identifying:

- **Personal information like age, gender, where they live, etc.**
- **Pain points and challenges**
- **Title, seniority, company style**

Outlining these attributes will help you to define your target audience. Ideally, you will define 3-5 distinct audiences. Next, you'll need to segment your lists in order to tailor your messaging to the unique needs and interests of your different audiences.

Benefits of Proper Segmentation

INCREASE

- Open Rates
- Click-Through-Rates
- Conversions

DECREASE

- Unsubscribes
- Soft bounces / Spam filtering

Assuming you have quality lead lists to start with, segmenting your lists properly will set you up for success to target your leads specific needs and interests.



STEP TWO: Increase Open Rates Through Engaging Subject Lines

We can learn a lot from credible email marketers about how to optimize our emails for sales prospecting. Spam filters are programmed to pick up on clickbait subject lines, getting your emails sent to spam after a certain number of offenses¹. For those emails that make it to the inbox, 33% of people decide whether or not to open an email based on the subject line alone². Don't lose a third of your leads over a bad subject line. Create honest subject lines that entice the reader to want to learn more.

Keep it short

Limit your character length to 50 characters so the reader can see the entire message, whether they're viewing it on their phone, tablet, or computer.

Personalize

Personalized subject lines increase open rates by 29%³. Use their name, location, or company to add a touch of human connection.

Tell them what's inside

Incentivize. If you're offering the 3 best consulting tips for small businesses, tell them.

Use action-oriented verbs

Mimic a call-to-action, relevant to your conversion goal, that will subconsciously influence people to take action and open your email.

Create a sense of urgency

The key here is to create subject lines that require an action within a certain time frame, without demanding anything from the reader. Subject lines with a sense of urgency, when done correctly, can increase open rates up to 22%².

Ask yourself:

"Would I open this?"

You're an avid subject-line reader as much as the next guy. Ask yourself if the subject would entice you to open the email. If you'd ignore it, it probably isn't enticing enough. If you'd spam it, it probably doesn't feel genuine.



STEP THREE: Personalize Messaging To Individual Audiences

Email personalization increases click-through rates by 41%⁴, yet it has been reported that as little as 5% of companies segment and personalize emails properly⁵. Adding a few personalization tokens can make you stand out in the inbox amongst your competitors, and boost engagement and click-throughs with your leads. Once you've defined and segmented your target audiences, you're already a step ahead of the game. Not to mention, you'll establish a personal connection with leads by tailoring emails to fit specific buyer personas. Whether you have an automated personalization feature built into your email tool or not, you can create personalization tokens in several ways.

Here are some easy-to-implement ways you can add personalization tokens to your email campaigns:

Highlight relevant pain points...and solutions

For cold leads, especially those who are unfamiliar with your brand, you'll want to highlight any challenges relevant to them- and how your product serves as a solution. Let's say you're trying to sell your top of the line lawnmowers to golf club managers. You could highlight the frustration around lawnmower breakdowns, and how your lawnmower has a backup rotary motor to prevent breakdowns and pick up the slack on large courses. If you were a club manager constantly dealing with the headache of club members complaining of uneven driveway, wouldn't that spark your interest?

Add location and time

If you have leads in different time zones and regions, you'll want to segment your lists further by time and location. Sending an email about your amazing coffee from Central America to a group of leads at 3:00 in the afternoon is probably going to be less enticing than it would be at 7:00 in the morning when they're getting ready for work.

Offer relevant content and redirects

Adding free content offerings, with no strings attached, is an effective way to warm leads. That content should be relevant to their specific needs and interests. Let's say you're trying to sell a state-of-the-art blender, and you've segmented your lists by "Moms" and "Body Builders". Sending recipes for protein drinks will likely be more enticing to the second group of gym junkies, whereas busy moms may enjoy a list of quick-and-easy breakfast shake recipes for kids.

Setup automated behavioral trigger emails... and ask the right questions

In this case, you will need to have a feature built into your email tool that allows you to implement these triggers. You can refine personalization over time by tracking how leads and prospects interact with your brand. When your lead visits your site or a landing page, or they download a piece of content, you can set up trigger emails to be sent out in response to their engagement with your brand. Devise questions specific to their engagement, like: "I noticed you downloaded our case study. What did you think?"



STEP FOUR: Test And Retest To Maximize Engagement And Conversions

The advantage of having extensive lead lists is the ability to test what is working in small chunks and optimize messaging overtime. A/B testing is the go-to method of testing email variations, as it limits the variables being tested so you can accurately measure what best engages your audience.

There are several ways to A/B test emails that can pinpoint significant areas of optimization:

Subject line

Subject lines are your leads first impression of your emails, and are therefore usually the first to be tested. Elements like phrasing, length or personalization tokens are good to test. You could start by testing a number against a personalization token. For example: “15% off your next order of multicolored fax paper” versus “John, discount off your next order of fax paper.” If you don’t see a significant disparity in open rates between the two, try combining them after the test to see how it performs, like “John, 15% off your order of fax paper.” In this case, if you do not have the option to create automated personalization tokens via your email tool, you can still personalize your email to the audience based on their challenges and interests.

Layout and images

People are visual. Images break up content for easier readability. You can try sending an email with a gif or an image, and varying the placement of the image. Or, you can test two different images with equal placement in the email.

Links to conversion

Links embedded in your sales emails are an essential tool used to move leads through the sales funnel and increase your rate of conversions. To get leads to download content, for example, you can try A/B testing links by copy or placement. Be sure to only vary one aspect of the link so you know what it is that caused readers to engage with the well-performing link.

Timing

Varying the time emails are sent can provide valuable insight into specific persona behavior. Just be sure to account for time zones when testing this variable. It would be best to limit the test by time-zone to get an accurate reading. For example, an A/B test by time-zone may look something like this:

Email variation 1 for contacts on the west coast: send at 8:00 am PST
Email variation 1 for contacts on the east coast: send at 8:00 am EST
Email variation 2 for contacts on the west coast: send at 9:30 am PST
Email variation 2 for contacts on the east coast: send at 9:30 am EST

Sent address

Depending on who's receiving your emails, you'll want to test sender contacts to see how it impacts open rates. For example, leads receiving an email about a SaaS product for their business may respond better to an email sent from a person in a position like their own, because they feel they can relate better to their particular pain points and goals surrounding the product's use.

When should you stop testing? Once your test reaches statistical significance, you can begin implementing the variables that worked for that particular audience. This is where many companies fail. A/B testing should be an ongoing process. Just because a particular CTA, layout, or other variation worked well on a particular audience for one campaign, doesn't mean it will work the next time. Continue to test and retest aspects of your messaging, and you'll stay ahead of the email game.

STEP FIVE: Optimize and Repeat

You'll want to think like your potential client or customer, putting yourself in their shoes as they browse their inbox throughout the day. Keep these following items in mind as you continue to optimize your email campaigns overtime:

Optimize on all platforms for easy readability

People read email on different devices, and at different times of day. They may be on mobile until they get settled in their cubicle at 9:00 am, and on their tablet in the evening. For this reason, it is important to make sure your emails are setup to adjust for responsiveness across all platforms. Depending on the software or online tool you're using, you may have adjust some settings to optimize email responsiveness on different platforms.

Focus on warming your leads

Not all qualified leads are ready to buy right now. This doesn't make them bad leads. On the contrary, it gives you the opportunity to warm them up overtime, familiarize them with your brand, and create trust and brand loyalty by offering them relevant content and product information until they're ready to buy.

Invest in highly targeted, quality email lists

All of these steps are utterly useless if you don't have a quality list of contacts to reach out to. To avoid wasting time and money on poor quality lists with low deliverability, be sure to take the time to find list services that provide human-verified email addresses and other contact information.

By following these steps to creating a successful email prospecting campaign, you can get more out of your lead lists than ever before. Proper segmentation of your lists, subject line strategy, personalization, and testing are all keys to maximizing your opens, click-throughs and conversions.

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