



This Time, It's Personal

20 TIPS FOR SENDING
AUTOMATED EMAILS
WITHOUT SOUNDING
LIKE A ROBOT

HI VALUED
CUSTOMER...

YOUR ORDER IS
BEING PROCESSED

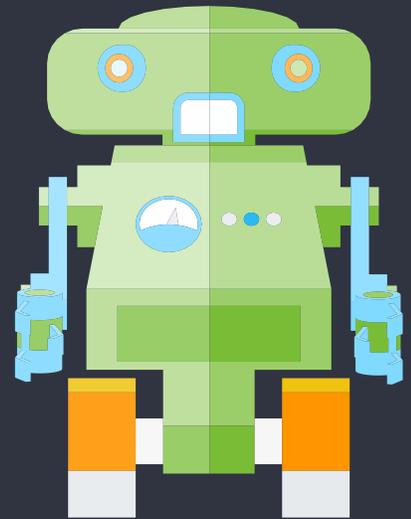
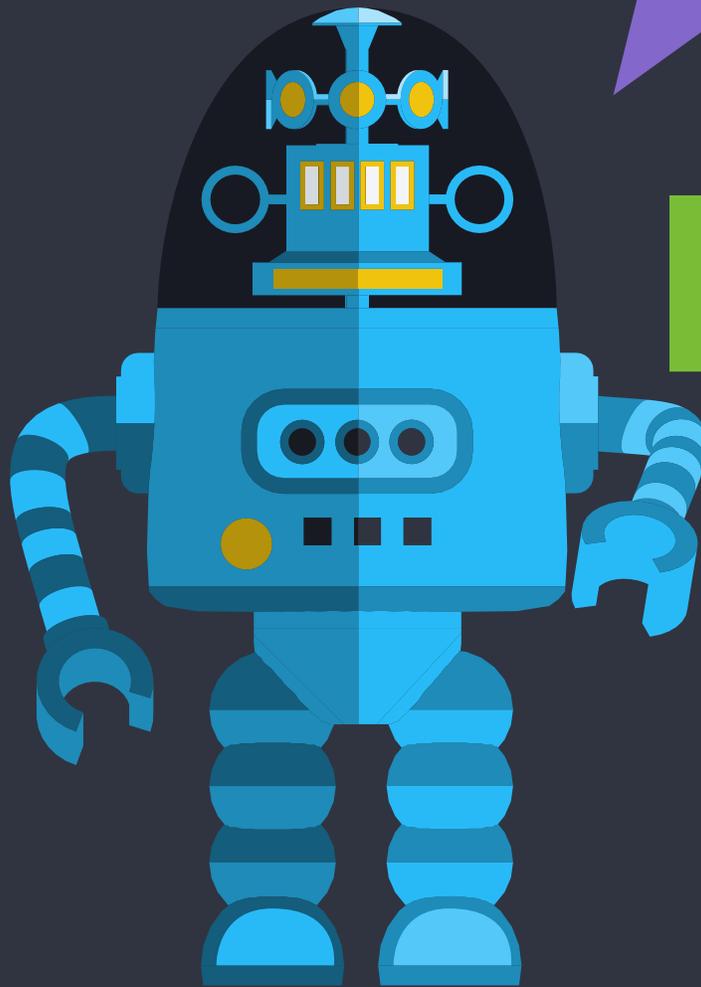
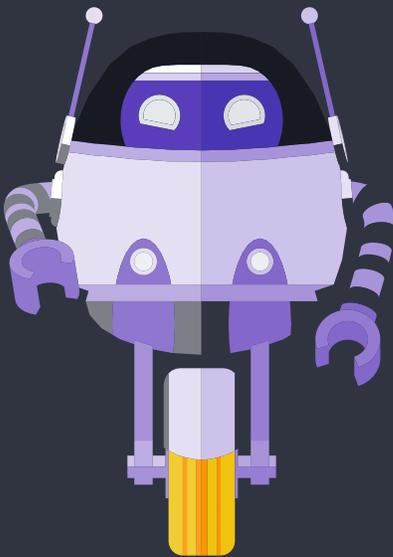
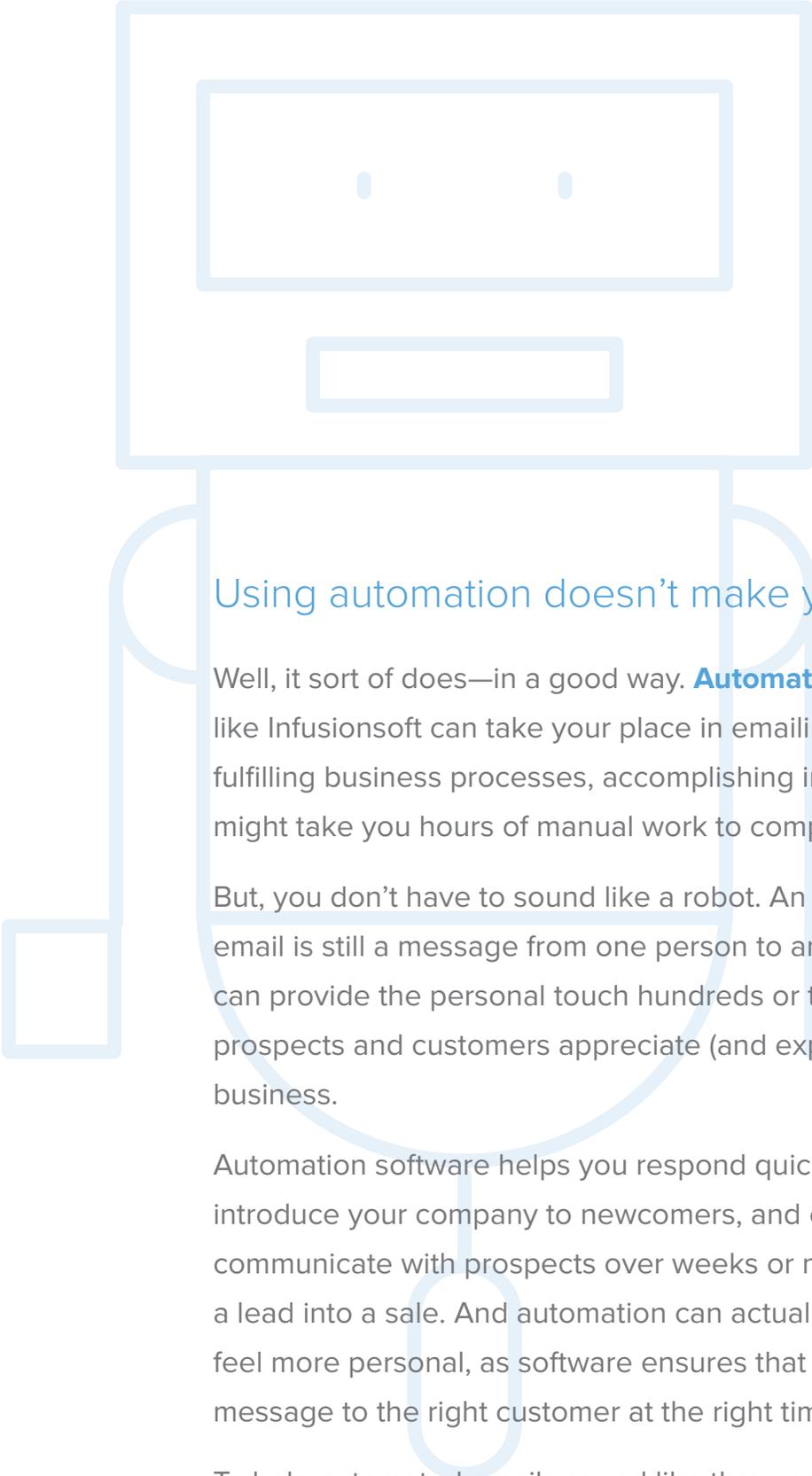


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Using automation doesn't make you a robot.

Well, it sort of does—in a good way. **Automation software** like Infusionsoft can take your place in emailing contacts and fulfilling business processes, accomplishing in moments what might take you hours of manual work to complete.

But, you don't have to sound like a robot. An automated email is still a message from one person to another, one that can provide the personal touch hundreds or thousands of prospects and customers appreciate (and expect) from a small business.

Automation software helps you respond quickly to inquiries, introduce your company to newcomers, and consistently communicate with prospects over weeks or months to nurture a lead into a sale. And automation can actually make emails feel more personal, as software ensures that you send the right message to the right customer at the right time, every time.

To help automated emails sound like they came from you—if there were a thousand yous—use these twenty strategies, tips, and tricks.

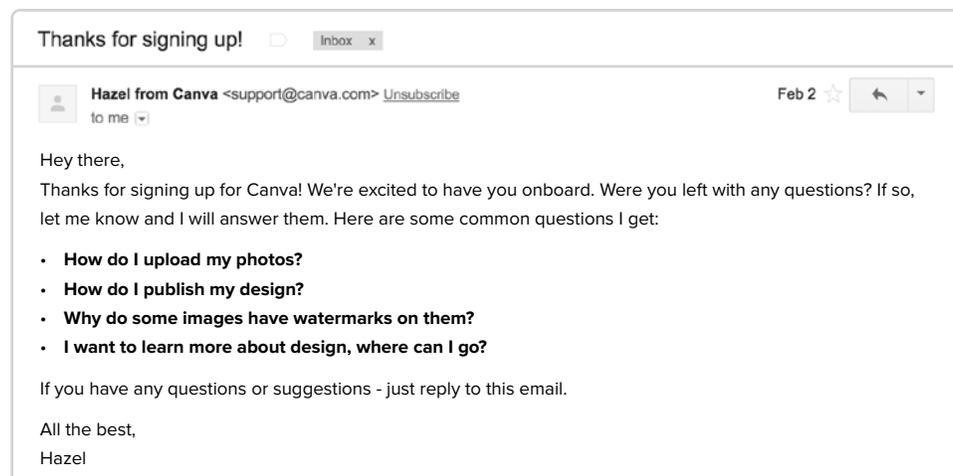


Add a Personal Touch

People like to buy from people, not from companies. Follow these tips for writing emails that, although automated, feel like they were written from you to your customer.

1 Send some emails from you, not the company

Customers are used to seeing branded emails sent from your company (and every company) that contain logos and marketing messages. Stand out in an inbox by occasionally sending automated emails from you or a staff member, not your company. Drop your branding for regular old text, and use merge fields ([see page six](#)) to address the customer personally.



Using automation software, you can schedule these messages to interrupt business-as-usual communication. Send them for more sensitive emails, like a referral request, or impress the customer with attentive service by personally asking about her satisfaction with your product or service.

2 Write like you talk

Picture yourself face-to-face with a potential customer. If he asked you to send information about your company, would you respond with, “Your inquiry has been received. A representative will contact you within two business days”?

No. The answer is no.

So don't write that. Use conversational language in automated emails, the way you would if you were talking or writing to a single customer. Automation simply takes that message and scales it to reach a much larger group.

Look what you did, you little jerk...

The Hustle

Sent: Thursday, March 10, 2016 at 1:38 PM

I assure you, we don't take what just happened lightly.

You gave us your email and joined our newsletter.

That's a VERY big deal to us.

Don't believe me?

After you pressed the submit button and sent us your email a little buzzer went off in our office. Our entire team can hear it, and when it went off everyone smiled.

Our office manager gave a golf clap and our operations guy did a pushup (I don't know why, but for some reason he does a pushup each time the buzzer goes off).

Greg our head of marketing, ran outside and hugged some old lady walking by the office. I'm pretty sure he just tried to kiss her. She didn't seem to mind it, thankfully.

3 Use a subject line you'd send to a friend

Your subject line introduces the content of your email, so one that sounds like personal correspondence has a good chance of being opened. Act like you're sending the email to a friend by writing a subject line like, **"Are you free this week?"** or using merge fields for **"Hey [First Name]!"**

4 Include a photo

Add a headshot to your email signature. A photo helps reinforce that there's a real person with thoughts and emotions—not a robot—behind your company.

5 Make unsubscribing more casual

Every mass marketing email you send, even one that's personalized, needs a link for unsubscribing or opting out if your list. **It's the law.** But while you can't remove the link, you can **customize it** so it looks a little less official. Instead of the standard "click here to unsubscribe" message, try something like, **"Click here to let me know if you don't want to hear from me anymore."**

Hi Amy,

I wanted to reach out to see if you would be open for a quick call sometime in the next few weeks to discuss your plans to use interactive content in 2016.

To give you a little context, SnapApp is the fastest, easiest way to create, publish, manage and measure a wide range of interactive content experiences like assessments, calculators, interactive videos, interactive info graphics, etc. Our platform allows anyone, without the need for coding knowledge, to create the interactive content they need to considerably drive up visitor engagement and conversion rates.

Looking at 2015, SnapApp customers are seeing that 80% of visitors to their interactive content are engaging with the entire experience, and 45% of those go on to convert into a lead with a lot of rich data.

If your focus in 2016 is on conversion optimization, demand generation, content marketing or visitor engagement, then I think it'd be worth your time for a quick call to discuss whether or not we can help. Are you open to a quick call later this week or next to chat learn a little more about interactive content working for you and the team?

Thank you!

My Best,
Aisling @ SnapApp

6 Step away from the marketing message

Not every email needs to have direct correlation to your sales and marketing objectives. The goal of some emails can be simply striking up conversation. Share a funny video on a Friday, show off a picture of your dog or kid, or ask contacts how their holidays were. Consumers are used to companies asking for their money, not asking about them as people.



Make Magic with Merge Fields

If you're an Infusionsoft user, you can use **merge fields** to automatically insert data from customer contact records into emails so that "Hi, [First Name]" becomes "Hi, Lauren" or "Hi, Joe." When you use these tips, emails become so personalized that customers may not even realize they're automated. Many other automation platforms have similar functionality.

7 Call contacts by name

It's not too surprising to see your name at the beginning of a message. But a mid-email or mid-sentence reference feels a little more personal—and helps to catch the customer's attention.

Using merge fields, repeat customer names a couple times per email, like, "I wanted to ask, Lauren, are you available tomorrow?" or "Enjoy your weekend, Lauren!" But be sure to use only the customer's first name. Nothing says "robot alert" like "Enjoy your weekend, Lauren Jackson!"

Hey Brett,

I had an interesting experience the other day, if you have a sec, I'd love to share it with you.

Someone came to my website and submitted the contact us form, Joe D. from Colorado.

Joe had a question for me about refunding part of a payment plan, and oddly enough, I had answered a similar question recently in the Infusionsoft Community forums. So, I answered the question for him, and then we exchanged a few emails.

I was about to sign off and before I did I thought - ya know, if Joe has questions like this one regularly, he could probably benefit from my **Monkeypod OG Membership**. I should tell him about it. So I did.

Well Joe signed up immediately in his reply to me he said that he really appreciated the invitation. He said he had heard about me, and about Monkeypod, and he was flattered by my personal invite.

He was FLATTERED? It blew my mind.

You see, I'm really freakin' proud of the OG Membership, and all the benefits that it offers - but I think maybe I've been a little passive about it because I didn't want to shove it in someone's face. But as a result, I guess maybe I've underserved my audience.

Anyways, no more excuses for me (or you), **please let THIS email serve as** your own personal invitation to join the Monkeypod OG Membership.

Yup, I want you, Brett, to join me and the 63 other businesses growing with their Monkeypod Members.

8 Start name-dropping

Use additional names or information if you have it in your records. Wish Lauren and her husband, Joe, a happy Valentine's Day, see if Sparky (the dog) needs a pet-sitter this month, or send an offer for Lauren's Honda CRV.

If you don't have this kind of information, ask for it if it's relevant to your business. See tip No. 20 to find out how.



Lauren,

Congratulations on your recent purchase of a Honda CRV.

Your savings don't end at the showroom. As a Costco member you're eligible to receive **15% off parts, service and accessories** on any vehicle you own, including the one you just bought.

9 Show you know who's who

Work in a contact's company and job title to show that this email is intended for her, not just anyone: "Knowing you're the [Job Title], I thought you might be the best person to talk to at [Company Name]. If you're not, would you mind pointing me to the right person?"

10 Always know what day it is

Even if you wrote the email months ago, a date merge field makes it seem current every time. By including a sendoff like, "Have a great [Day of the Week]!" your customer might not suspect that you didn't actually write the email that day.

11 Make old content new again

When you bring a new customer on board, you might welcome her with a series of e-newsletters you've used in the past. There's no need to change the date on each edition if you label it "The [Month] [Year] Newsletter."

12 Talk up their town

Automated small talk gets personal with the help of a location merge field. Ask "**How's the weather in [City] today?**" or venture a guess that "**I bet you have great pizza in [City.]**"

13 Reminisce about the first time you met

If you're the networking type, let automation software **follow up with your new contacts** for you. When adding someone to your contact records, create a field for the event where you met. Then send off an automated email to the effect of, **"Hi again, [First Name]! I wanted to follow up to tell you how much I enjoyed our conversation at [Conference Name.]"**



Pro Tip: *To add contacts on the go, download an app that scans business cards using your smartphone's camera. **Snap**, a free app, adds a person's name, contact information, address, and company directly to Infusionsoft.*



Write at the Right Time

Automated emails may not seem automated if they arrive at the perfect time. Use these tips to send automated, personalized messages just as customers are looking to talk, learn, or buy.

14 Respond quickly—but not too quickly

Automation software can respond to a “contact us” inquiry within a couple of seconds. But that’s what a robot would do. A human would be considered fast if she responded within five or ten minutes.

With Infusionsoft, as well as some other automation platforms, you can set a **delay timer** to send your **automated reply** after a realistic length of time. Write the reply as if you typed it up: **“Hi [First Name], thanks for your note! I’ll be in touch soon, but I wanted to let you know that I got your message.”** The customer will be impressed that you check email so diligently, while you’ve bought yourself more time to call or respond at length.

15 Win the game of phone tag

You could spend half of every day chasing down customers who haven't returned your calls. Software helps you win at phone tag by automating part of the process while still keeping the conversation personal.

After you leave a voicemail for a customer, you can record a note in the software that triggers an **automatic email**: **"Sorry I missed you! I just left you a message. If I don't hear from you, I'll try calling you again tomorrow."**

16 Follow up on a download

After a customer enters his email address to download a resource, like an e-book or video, you can schedule an automated follow-up email to be sent a few days later. With Infusionsoft, you'll be able to tell whether the customer actually clicked the email link to the resource.

But telling the customer, "I know you just downloaded my e-book," is a little creepy. It's better to play it casual and ask, "Have you had a chance to download the e-book?" (for someone you know hasn't) or, "What did you think of the e-book?" (for someone you know is ready to discuss).

17 Wish customers a happy birthday

With Infusionsoft, you can **wish every customer a happy birthday**, no calendar required. If you have a customer's birthday in her contact record, you can set up an automated sequence in which she receives a personal message on or just before the big day. The same can be done for an anniversary or other type of holiday. A small gesture can make a big impression on customers, who don't often receive thoughtful messages from companies.



What else could your business automate? A lot.

Download our free e-book, 25 Things Every Small Business Should Automate.





Send Them What They Want

Personalized emails are only so effective if you're also sending customers irrelevant information, like offers for a service they don't need or promotions for a product they already purchased. Automation software can help you determine what your customers want to hear through these tactics.

18 Use segmentation for personalization

Say you have two pet boarding facilities, each on the opposite side of town. A customer may only visit one facility and own a dog, not a cat. Using automation software like Infusionsoft, you can segment your contact list so that customers receive only the emails of interest to them—which, as a result, feel more personal. Tags can be applied to customer contact records, either manually or as a result of an action they take, like clicking a link for the location they want to visit.



For an in-depth look at segmentation, check out our free e-book, [Take Your CRM Contact List to the Next Level with Segmentation](#).



19 Personalize the next offer

Create an automated sequence in which a purchase is followed by email offers for complementary products or services. The strategy not only helps emails feel more customized to the customer, it helps your company grow sales through repeat business.

20 Ask what they want

Not sure what customers are interested in? Try simply asking them for the information you need to better understand them and their needs. As part of an automated sequence, send an email asking the customer to complete a web form. The new data will automatically be added to contact records, helping you to personalize communication in the future.

Cheat Sheet:

20 Ways to Personalize Automated Emails

An automated email can be sent to hundreds or thousands of contacts, but it doesn't have to feel that way. Use these tips for sending automated emails that read like personal correspondence between you and your customer.

Add a personal touch

- 1 Send occasional non-branded, plain-text emails from you, not the company
- 2 Write as if you're talking to a single customer
- 3 Use a subject line you'd send to a friend
- 4 Include a headshot in your signature
- 5 Change "click unsubscribe" to "let me know if you don't want to hear from me anymore"
- 6 Mix up marketing messages with funny videos, personal photos, and holiday greetings

Make magic with merge fields

- 7 Call contacts by name, i.e. "Hi, [First Name]!"
- 8 Name-drop other contacts, like the customer's spouse or child
- 9 Show you know who's who, i.e. "Knowing you're the [Job Title], I thought you might be the best person to talk to at [Company Name]"
- 10 Reference the current day, i.e. "Have a great [Day of the Week]!"
- 11 Make old content new, i.e. "The [Month] [Year] Newsletter"
- 12 Talk up a contact's town, i.e. "How's the weather in [City] today?"
- 13 Reminisce about the first time you met by referencing an event or meeting place

Write at the right time

- 14 Respond quickly—but not too quickly—by putting an automatic reply on a delay timer
- 15 Win at phone tag by using an automated email to follow up on a missed call
- 16 Check in on a downloaded resource with a personal message
- 17 Wish every customer a happy birthday (or anniversary or holiday)

Send them what they want

- 18 Use segmentation for personalization by tagging customers based on their interests and behavior
- 19 Personalize the next offer with automation
- 20 Ask what they want through a web form



Amy Saunders

Amy Saunders is a content creator at Infusionsoft, where she writes content that inspires and empowers small business owners. Writing about business brings Amy's work full circle: She began her career as a business reporter at The Columbus Dispatch in Ohio before becoming a features writer. After more than six years there, she moved to Phoenix, where she was an editor at a content marketing agency before joining Infusionsoft. As a lifelong Midwesterner, Amy promises to never take Arizona weather for granted and spends her free time riding horses, playing tennis and hiking in the sun.

Follow her on Twitter [@amyksaunders](#)

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