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 client.

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 client
3. Use a subject line you'd send to a friend
4. Include a headshot in your signature
5. Change "Unsubscribe" to "I'm no longer interested in hearing from you"
6. Mix up marketing messages with funny videos, personal photos, and holiday greetings
7. Call contacts by name, i.e. "Hi, [First Name]!"

Write at the right time

1. Respond quickly—but not too quickly—by putting an automatic reply on a delay timer
2. Win at phone tag by using an automated email to follow up on a missed call
3. Check in on a downloaded resource with a personal message
4. Wish every client a happy birthday (or anniversary or holiday)

Make magic with merge fields

1. Name-drop other contacts, like the customer's colleague or a shared contact
2. 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]"
3. Reference the current day, i.e. "Have a great [Day of the Week]!"
4. Make old content new, i.e. "The [Month] [Year] Newsletter"
5. Talk up a contact's town, i.e. "How's the weather in [City] today?"
6. Reminisce about the first time you met by referencing the event or meeting place

Send them what they want

1. Use segmentation for personalization by tagging contacts based on their interests and behavior
2. Personalize the next offer with automation
3. Ask what they want through a web form

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