



21 B2B SALES PERSONALIZATION TIPS THAT WILL TRIPLE YOUR ENGAGEMENT RATES





ringDNA

Enterprise Sales Acceleration & Communication Platform

TABLE OF CONTENTS

FORWARD

Are you ready to end the era of generic sales messaging?

Every study, data point and anecdote suggests that the only good answer to this question is “yes.”

In this era of efficient sales and marketing automation tools, personalization seems like the slow, rocky road to success. But it’s not that simple. The very best sales teams will learn how to use automation to great effect, while still adding individualized value to emails, calls and other activities.

But how can reps adequately personalize sales calls and emails, while still touching enough prospects to hit quota? To find out, we surveyed several top sales executives and coaches. The result? A collection of actionable tips to help your sales team including:

- Sales emails that just don’t work anymore
- Emails that get up to 3X more responses
- The most effective way to personalize calls and emails without sacrificing productivity

At the end of the day, succeeding in sales requires enabling each prospect to uniquely envision the individualized value that your solution can provide. This eBook will reveal how some of the world’s most successful salespeople do just that.

01

WHY PERSONALIZE SALES COMMUNICATIONS?

CONVINCE PROSPECTS YOU'RE NOT A SALES ROBOT

To run the risk of oversimplifying 'personalization,' its main purpose is to catch your prospect's attention, but more often, simply convince them that you're not a sales robot. With dozens of sales and marketing automation tools sending "personalized" emails, it can become confusing to prospects which emails are automated & which emails were generated from a living, breathing, helpful salesperson.

Good personalization helps you break through the hundreds of automated messages in someone's inbox, create a personal connection with your prospect and compel them to act. It's easy to dismiss a general, seemingly automated email, but if someone proves to me that this email was meant for me and only me, I feel a lot more guilty ignoring it!

When it comes to the elements of personalization, it's crucial to be authentic, be relevant, and always add value. If you're going to mention something, make sure you can relate it back to your pitch. Don't tell them you love their dog's name then ask them if they're happy with their current CRM solution... where's the connection?! If I can, I like to mention mutual customers, mutual connections, or something about the prospect's professional experience that I can relate back to my pitch. If you can find content that your prospect is featured in, or has written, even better.

Adam Brophy
Manager, Business Development, Uberflip
Uberflip.com
@AdamBrophy7

START AUTHENTIC CONVERSATIONS

"You have to start authentic and thoughtful conversations that add value to your audience. Anything generic that gets used by a lot of other people won't work anymore. So any time you see "the world's best template on the internet," chances are that it probably won't work, because a million different salespeople are also using it. You really have to learn how to create your own authentic approach that works for you and your audience. If you just copy someone else's template, your email will bomb.

Heather R. Morgan
CEO, SalesFolk
SalesFolk.com
@HeatherReyhan

DEMONSTRATE ACTUAL VALUE

The golden rule of prospecting is that you should always offer value. Salespeople have the power to educate prospects and help solve complex problems. But in order to demonstrate actual value, you need to prove that you understand their industry and their role. If you take a one-size-fits-all approach to messaging, you're going to annoy a lot of prospects and have little to show for it.

Howard Brown
Founder & CEO, RingDNA
RingDNA.com
@HowardBrown

ringDNA

02

3 ESSENTIAL THINGS YOU NEED TO KNOW ABOUT PROSPECTS IN ORDER TO PERSONALIZE MESSAGING

Which aspects of your messages should be tailored to your prospects? We asked several sales leaders to name the three most important things that you need to know about prospects prior to reaching out in order to successfully personalize sales messages.

Salespeople must first consider themselves in the prospect's shoes. When you have purchase authority in your organization, and the marketplace is made aware, you receive solicitation calls and emails throughout your day, every day. Those who differentiate themselves by messaging you the right way, at the right time, with the right information are the ones who earn the meeting.

Answer these three questions before calling a prospect:

WHO DO I KNOW THAT KNOWS MY PROSPECT?

WHY MUST MY PROSPECT HEAR FROM MY COMPANY AND ME AT THIS VERY MOMENT?

WHO INFLUENCES MY PROSPECT?

Who do I know that knows my prospect? The late sales master, Chet Holmes, said, "You can get to anyone if you're determined." Now that that's out of the way, find out who you and your prospect both know.

Ralph Barsi
Senior Director, Global Demand Center, ServiceNow
ServiceNow.com
@RBarsi

The six degrees of separation theory proves this as true, and technology enables you to research how you're connected, so get to work. Once you identify your mutual connections, do you have enough credibility and rapport to contact that connection and ask if they'll broker an introduction?

Why must my prospect hear from my company and me at this very moment? Your new offering just hit the market, your webinar will feature these special guests, your company just reported significant year-over-year growth, and you just saw your prospect present at last week's conference. So what?

Unless you share insights about your prospect's business, along with answers they need now, your company, your offering, and you don't matter. Work hard to uncover several reasons why they must hear from you at this moment in time.

Who influences my prospect? Salespeople who influence the influencers are cooking with gas. Studies reveal that 91% of B2B buyers are influenced by word-of-mouth when making their decision. Where are you in the ecosystem? How involved are you, and how much value are you adding to your prospects' circles (like associations, local meetups, or online industry groups)?

Practice giving, giving, giving, then asking. Have a positive, systemic impact when you're selling, and ensure your customers talk about all you and your offering has done for them.

Ralph Barsi
Senior Director, Global Demand Center, ServiceNow
ServiceNow.com
@RBarsi

The 3 most important things to know about a prospect before calling them are...

1. What is the role of the individual that you are speaking with?
2. Who are the prospect's competitors? If you have helped companies with similar attributes in the past, it's easy to suggest relevant solutions.
3. Is the prospect an analyst or decision maker?

John Kosturos
CRO, RingLead
RingLead.com
@jkos3

1. Their decision-making capacity in their organization.
Are they a decision-maker, a key decision-maker or THE decision-maker? How much clout do they actually have when it comes to making buying decisions? And are their goals and pain points in line with those of the rest of the company?

The closer you can get to uncovering the interpersonal dynamics and realpolitik at your prospect's level of the organization, the fewer rabbit holes you'll fall into.

2. What they do best and take the most pride in as a professional.
Look, no one wants to admit to brown-nosing or flattering during cold calls. But I'll tell you right now, if a marketing automation sales rep got me on the phone and spent the next 30-60 seconds after his introduction telling me how great Ambition's content is and why, 10 out of 10 times, he'd hear a much more open, welcoming response from yours truly. Not to mention a greater willingness to hear his pitch.

When you can discover what your prospect does best and takes the most pride in professionally, you can up your odds of taking the conversation to the next level. There's just one caveat: you should come off as genuine.

3. Current customers/champions of yours that your prospect is most likely to recognize, respect and have a relationship with - based on industry/profession.

Jeremy Boudinet
Director of Marketing, Ambition
Ambition.com
@BoudinetJ

The first half of a good sales call should be spent understanding:

1. the prospect's business
2. their role/responsibilities
3. what they are trying to achieve

With that information you can educate them on their options and position your product as part of the solution.

Dan Murphy
VP Business Development, Import.io
Import.io
@DanTMurphy

03

HOW TO MAKE CALLS MORE SUCCESSFUL

When reaching out to new prospects via telephone, there is little room for error. You only have, at most, a minute to convince a prospect to stay on the phone. We asked sales experts to reveal tips that help turn those calls into smashing successes.

THE “WHAT’S IN IT FOR THEM” MINDSET

The personalization of a sales call starts before the dial. It begins with your mindset and preparation. Even if you make 75 dials a day, the person on the other line doesn’t care. If you are interrupting them or asking them for their time, you better be ready to engage WITH them.

Ensure your minutes with the prospect are relevant to them and interesting for them with effective preparation. The level of your preparation directly links to their level of interest in what you have to say or offer.

Prepare a What’s in it For Them? mindset so that anything that comes out of your mouth is connected to them. Prepare to seek a conversation with that person on the other end of the phone versus the “call” your competitors are making to this same person. Prepare how you will initiate the conversation. Then, quickly convey why the conversation will be worth their time. And finally, prepare and remove all your distractions so, from the first nano-second on, the conversation is completely focused on them (and how what you offer will benefit them).

Nancy Bleeke
President and Chief Sales Officer, Sales Pro Insider
SalesProInsider.com
@SalesProInsider

ALWAYS HAVE A REASON FOR CALLING

“There should always be a reason for reaching out. How has a prospect interacted with your brand, product or online content? Maybe they attended a conference or have a mutual contact. Our data shows that if you can mention the reason for your call in the first 20 seconds, there is a 36% higher chance of having a real conversation (which we define as lasting longer than two minutes). So focus on why you’re calling and what value you can bring to that conversation, and be sure to get to it in the first 20 seconds.

Howard Brown
Founder & CEO, RingDNA
RingDNA.com
@HowardBrown

MENTION SPECIFIC COMPANIES DURING VOICEMAILS

Social proof is one of the biggest drivers for people to take action. When you're making your calls or sending your e-mails, if you can mention another client who fits a similar profile and talk about the results you drove for them, it will increase the response and interest rate significantly. The ideal situation would be to say something like, "We showed XYZ company in your industry how to drive ABC results and I'd like to speak with you about it."

John Barrows
Owner, jBarrows.com
jBarrows.com
@JohnMBarrows

THE RIGHT MESSAGE AT THE RIGHT TIME

Reaching out with the right message isn't enough, you also have to reach out at the right time. Prioritize those leads most likely to engage. How do you do that? By reaching out when they're experiencing pain. If I'm thinking about the current pain, then you'd better be ready to call me right away, before the window closes. Understand the signals that indicate a change in my priorities — a security gap, a missed quarter or a new hire. Then, when you know the signals that matter, you can predict which prospects to prioritize, and know what to tell them.

Peter Mollins
Vice President of Marketing, KnowledgeTree
KnowledgeTree.com
@PeterMollins

04

TIPS FOR GETTING MORE EMAIL RESPONSES

Your prospects' inboxes are likely full of emails from other sales reps. The good news is that by sending highly targeted emails you can cut through the noise. Here are some expert tips that can help you exponentially multiply your response rates.

PERSONALIZE BASED ON COMPANY GROWTH STAGE AND PROSPECT ROLE

When reaching out to a prospect to get a response, you must be able to get the prospect to THINK! They need to understand that the reason you are reaching out is relevant, and that you understand what the desired outcome should be. To do this, craft a message based on the company's stage of growth, and what role your contact plays at their company. Someone in marketing will care about different things than someone in finance or sales, so the message should be crafted to address their needs, in their language. You can go a step further and find content the prospect has written or spoken to an audience, and use keywords in their voice. This will allow them to identify with your messaging. It is also important to understand that email is a tool to create dialogue, not to just set meetings. A referral from somewhere inside of their company will get you a higher response rate than almost any other form of research you can do.

Phill Keene
Manager of Demand Generation, TinderBox
GetTinderBox.com
@PhillKeene

USE BUYER PERSONAS

“

Buyer personas have always been at the core of any of my sales or marketing initiatives. Whether I was marketing and selling theatre tickets, time and attendance software, or now partner platforms, I would be blind without a detailed understanding of my buyer personas.

When you are able to identify the actual people who embody your customers — not only their job roles, but also their goals, their challenges, their watering holes and their shopping preferences — this information allows you to hyper-target your sales and marketing efforts. And, when you’re able to obtain that degree of focus, suddenly your qualification rates increase, your sales cycle length diminishes, and you find yourself working with customers who are poised to be true evangelists of your product.

Jen Spencer
Director of Sales and Marketing, Allbound
Allbound.com
@JenSpencer

FOCUS ON ONE MAJOR IDEA OR BENEFIT

> If you want to write emails that convert well and get high response rates, then just focus on one major idea or benefit, and make sure that it follows all the way through; from the subject line, all the way to the call to action.

Heather R. Morgan
CEO, SalesFolk
SalesFolk.com
@HeatherReyhan

05

GREAT SALES EMAILS: 3 SHINING EXAMPLES

Here are a few real-life examples of emails that used personalization tactics to great effect. While each email took a very different approach to personalization, they all demonstrated that a lot of thought and research had been put in prior to reaching out. Each of these emails successfully garnered a response.

Subject: Ambition Software Referrals

Hey Jeremy,

Love what you guys are doing at Ambition. I actually tweeted about your sales job posting, it was the best I've seen to date haha.

I know you guys are well on your way to building a massive company but I wanted to share an experience I had as a sales manager for a SaaS company and how even with double digit growth MoM we were still leaving money on the table.

Like any other SaaS company we had a free trial option and had been collecting email addresses for quite some time. We were lucky enough to have good SEO and some decent exposure so there was a steady stream of inbound. I'm assuming you guys have a similar situation with the publicity from Ycom etc.

Anyway, we had thousands of people sitting there as expired trials. It was common practice to hit those guys up with emails of product updates but after enough conversations I realized that a lot of the people in that category just weren't the right fit for our product. So rather than try and optimize for trial reactivations I looked through all their social graphs and tried to optimize for referrals. (Typically business owners are influential over other business owners).

It seems like you guys are all hustlers over there so this might be something you're already doing but incase you haven't I did a quick example of what it might look like for you.

Do you know [redacted]? She's a client of yours and a rockstar online. I mean if you aren't constantly promoting her stuff you should be, she seems to be going places. Maybe more importantly she's well connected with a guy named [redacted]. He happens to be CEO of an IT company called [redacted]. So in this case it wasn't an expired trial but looking inside a user's influencer network can still reveal some potential leads.

Like I mentioned that's just one example and I've used this influencer data in a few other ways that had a noticeable impact to our trial/paid conversion rate. Happy to share more if you're interested.

Regards,

[redacted]

Re-reading it now, I'm still blown away. He nailed the entire thing. Every single line. Of course I called him immediately, if for no other reason than because I had to find out who he was.

Even though I wasn't in the market for influencer data—only thing he whiffed on with us was marketing budget size—I entered the conversation ready to introduce him to 4-5 other SaaS marketers who I knew placed a heavy influence on referral marketing.

So what if he didn't get the deal - he just got gift-wrapped five new prospects that fit his ideal customer profile to a tee. And rather than making contact by cold outreach, he got a warm intro.

What was his methodology? He spent, on average, 45 minutes on every single cold email he wrote. Writing it wasn't what took so long - he had a template. Instead, he dedicated almost all his prospecting time to research.

So, if you're a sales manager whose product or service necessitates a consultative, longer and more complex sales process, you'd be wise to allot research time into your daily activity quotas. Reps who do even 5 minutes of research place themselves at such an advantage over those who go in blind.

Jeremy Boudinet
Director of Marketing, Ambition
Ambition.com
@BoudinetJ

Subject: BEAR DOWN!

Hi Howard,

Hope your week is going well and thanks for stopping by our booth at SaaStr! :)

I noticed you are running Pardot, you can certainly appreciate a high-performing scoring model. I'd love to learn about the marketing strategy at RingDNA and share a bit more about [redacted] and how we can help you build pipeline and increase conversion.

What does your schedule look like next Wednesday for a quick chat?

Best,

[redacted]

"The subject line was "Bear Down!" The fight song for the University of Arizona (my alma mater). Once I did open it, I was pleasantly surprised to see that the rep not only mentioned a technology my company was using, but also mentioned a time we had met in person. She had clearly done her research and put thought into the email.

Howard Brown
Founder & CEO, RingDNA
RingDNA.com
@HowardBrown

Subject: Read your post on SalesHacker - going to try it on you ;)

Hey Jesse,

[redacted] from [redacted] here. Have you heard of us? Loved your blog post on SalesHacker yesterday. I've written a post for them as well, I'll share below.

I wanted to put your post to good use, so I'm going to try it out on you!

Reason being is because I truly do think that [redacted] would provide a ton of value for your content marketing team (both in creating an amazing content experience for your Knowledge section, but more importantly helping you fill the funnel with some more leads)

I've got your contact schedule on a sticky note on my monitor, so expect a LinkedIn request tomorrow, however I'd love if we skipped a few steps and connected right from this email ;)

Cheers,

[redacted]

"

I received an amazing prospecting email directly on the heels of publishing a blog post in Sales Hacker. In my blog post, I advocated a prospecting cadence that begins with email.

This rep didn't just break the ice, but absolutely shattered it by mentioning in the subject line that he had not only read my post, but was taking my advice to heart (what writer doesn't love that?). In the body of the email, he was able to establish credibility and common ground by mentioning that he had been published in Sales Hacker as well. As a result, I responded right away and even checked out a demo of his product.

Jesse Davis
Senior Content Marketing Manager, RingDNA
RingDNA.com
@JesseADavis

06

GENERIC EMAIL STRATEGIES THAT JUST DON'T WORK ANYMORE

Some email templates that have, in the past, worked wonders just aren't cutting it anymore. People can only see the same email popping up in their inbox so many times before they lose interest completely. We asked a few sales email experts to reveal which email strategies reps should break up with ASAP.

THE WHITEPAPER EMAIL

"The whitepaper email drives me nuts. If somebody downloads your whitepaper and you get the lead and then send off the template, "Thank you for downloading the whitepaper, I'd like to talk to you about your 2016 priorities and how we can help you achieve your goals." Please stop sending that meaningless and valueless e-mail. If prospects want to talk to you about a whitepaper, they will call you about the whitepaper. If nothing else, at least add the word "share" to it and say something like "and share with you some of the results we're driving for other clients like you." So I can see there is at least some value in calling you back. If it's not clear that I'm going to get value out of calling you back then don't bother sending the e-mail or making the call.

John Barrows
Owner, jBarrows.com
jBarrows.com
@JohnMBarrows

THE COLD EMAIL

If you're reaching out to somebody via email and you don't have any value to offer them, you're probably going to be seen as a nuisance. If you just ask for a meeting in an email or fifteen minutes to chat, without giving a good reason, you're going to be wasting a lot of people's time.

It's important to use language that speaks to the people you're reaching out to. To help, there are a lot of great services out there. Whether you use information providers like Datanyze or LinkedIn, even the smallest information about prospects can help you add some context to your email. With a bit of context you can truly stand out from the others.

Howard Brown
Founder & CEO, RingDNA
RingDNA.com
@HowardBrown

THE "WHO'S THE RIGHT PERSON?" EMAIL

> That whole generic 'who's the right person?' approach isn't credible anymore because LinkedIn enables us to see quite a few things about our customers. So the idea that you're just looking for the right person, and don't know who it is, is only credible if your prospect has a title that is very ambiguous or a role that could belong to different titles.

Heather R. Morgan
CEO, SalesFolk
SalesFolk.com
@HeatherReyhan

07

HOW TO MAXIMIZE PRODUCTIVITY WHILE PERSONALIZING MESSAGING

During a recent webinar that we hosted, John Barrows shared some amazing advice on how to personalize your messaging without losing productivity.

Marketing automation is starting to come upstream really fast and eat away at the value sales reps provide. Couple this with the amount of information customers have access to and you're starting to see the value of sales reps get severely impacted, especially the ones who are just going through the motions. As salespeople, an important question we need to ask ourselves these days is: what can we do that a computer can't? If a computer can do it, then you have to wonder how long you'll get paid commission to do it. If a sales rep is just going to send out template e-mails and make generic cold calls, I'd rather invest in a marketing automation tool, hire a few marketing people to manage it and split test messaging to find the highest conversion rates. So I think it really comes down to what Gary Vaynerchuk says when he talks about "if content is king, then context is god." Marketing is content, Sales is context. If, as a sales rep, you are not putting context around your content then you're no different than marketing and I don't know why you should get commission.

For me, my approach starts with figuring out who my audience is. I tier them out, so I have tier ones, tier twos and tier threes: my great clients, my average clients and my poor clients. Same thing within organizations. If I'm going after enterprise accounts it's my C-levels and VPs are my tier ones, my managers and directors are tier twos and my end users are tier threes.

That's how I decide how much effort I'm going to put into personalization vs. using automation. For my tier ones, I try to put a lot of thought into my messaging. I sit down and think through my cadence, I figure out what each message should look like and I don't really automate the messages.

John Barrows
Owner, jBarrows.com
jBarrows.com
@JohnMBarrows

For my tier twos, I don't mind automating as much. Separate these prospects by industry and role. And then come up with a tailored/targeted message to that group. Be specific about a prospect's industry and role. Get into persona-based stuff, where you can say something like, "The reason for my call is that we're showing CEOs in the healthcare industry how to drive these kind of results." CEOs in the healthcare industry have different priorities than CEOs in the manufacturing industry. So by speaking a prospect's language, you can really catch their attention.

And then, for my tier threes, I'm going to practice with them and automate the majority of my approach to them.

And for things like webinars, announcements, just let Marketing do that stuff. I always say, let Marketing market and Sales sell. Everyone knows what a marketing email looks like. I don't like my name on marketing emails, because when I reach out to a prospect, I want it to be very targeted based on those tiers.

John Barrows
Owner, jBarrows.com
jBarrows.com
@JohnMBarrows

ringDNA

More Calls. Smarter Conversations. More Revenue.

A brilliant inbound & outbound voice solution for inside sales teams using Salesforce

"RingDNA is our top sales technology investment, helping to drive 300% more revenue."

Dallas Hogensen
Head of Commercial Sales, Lyft

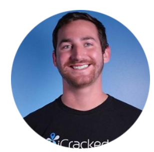
"Simply the best inside sales solution for Salesforce. With RingDNA, our team is reaching customers much more often and winning more deals."

Sean Whiteley
Founder, GetFeedback, a Campaign Monitor Company

"We're having 50% more conversations with key decision makers at enterprise companies. RingNA is our most instrumental and important investment."

Babak Badkube
Head of Inside Sales, Netskope

"RingDNA has made our reps 40% more productive and given us the ability to respond to leads much faster than ever before."



Evan Hanson
VP Sales, iCracked

Call us: 855.645.8028

yes - this is a call tracking number!

RingDNA.com