The ultimate guide to sales email automation

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Closing a sale is all about striking while the iron's hot

Reps need to connect with leads the moment they're ready to make a purchasing decision—and beat the competition to the punch.

Recent data from a Dimensional Research study showed that 46% of consumers preferred to communicate digitally, and 78% expected prompt follow-up from sales reps.

To beat the competition, your reps need to communicate the way your leads expect, when they expect it. How? With consistent sales outreach and timely follow-up emails.

The truth is, this is nearly impossible to do without automation. Manually crafting personalized emails for every lead in your pipeline is both time-consuming and tedious. To reach leads before competitors, sales reps need a fast, reliable solution for customer communication. That's where automation comes in.

Research

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Source

Your sales email automation tool can help you scale this process without sacrificing quality or personalization. All it takes is a solid understanding of sales email automation best practices and a strategy for implementing those best practices.

With this ebook, you'll learn how to use an email automation tool to build a sales outreach process that saves time, keeps your messaging consistent, and connects you with leads the moment they're ready to buy. We'll cover how to:

1	**Find and connect with high-value contacts**
2	**Set up cadences for automation follow-up emails**
3	**Craft engaging and personalized messaging at scale**

Let's get started...

01 Identify prospects

According to Dimensional Research, the biggest challenges for sales reps are all at the early stage of the cycle: generating, connecting with, and qualifying leads. How do you find leads that are truly interested in buying your products or services? How do you know if your contact is a key decision-maker at their company?

Partner with marketing

Your marketing team members are experts at lead generation, and they're a powerful resource for identifying high-quality leads. Trial sign-ups, white-paper downloads, and webinar attendance are often indications that a lead is interested in your products.

Sales reps can partner with marketing to identify these high-value leads. Just remember, marketing may already have a system for reaching out to these users, so make sure any communication you set up aligns with their outreach. Prevent overlaps in customer communication by consulting marketing to clarify who sends what, and when.

Identify the key decision-maker

In B2B sales, closing a deal relies on your ability to connect with the employees who have buying authority. This may be one employee or several, depending on the company.

Look back at some of your previously closed deals to identify common trends in your typical buyer, such as title role, department, and level within their company. You can do this manually by matching past buyers to their LinkedIn profiles.

If data enrichment is built into your email automation tool, you can automatically search for contacts within a company based on their role, title, department, and more. Plus, data enrichment tools will automatically pull the detailed contact information for any lead you do find. You can instantly send that contact a sales email without having to dig through social profiles for direct phone numbers.

02 Set a regular cadence for follow-ups

It can take multiple attempts to successfully connect with a prospect. As a general rule, reps should be sending multiple follow-up emails throughout the entire buying journey. The challenging part is knowing the optimal cadence for when and how often to send those emails. Here are a few best practices.

Follow the thirty-minute rule

Seventy-eight percent of prospects expect fast response times from sales during the buying experience, according to Dimensional Research. If a consumer is thinking about making a purchase, they're likely to go with the rep who responds first.

To beat your competition to the punch, we recommend following the 30-minute rule. When a prospect completes an action that indicates interest in your brand—downloading a white paper, signing up for a free trial—follow up within half an hour. Based on our experience here at Zendesk, any longer than that could cost you the lead.

To save time, consider creating follow-up templates specific to each action. We'll talk about this more in Step 3 (page 7), but the goal is to have a customized response ready to go the moment an action is completed. This eliminates the manual work of drafting an email, reducing the time it takes to send a personalized follow-up.

Set a regular cadence for follow-ups

Be persistent (but not annoying)

The total number of emails you should send in one sequence will vary depending on your industry and your specific customer base. At Zendesk, we've found that 14 to 16 outreach attempts over the course of 20 days are most effective for engaging prospects.

When scheduling sales outreach with your email automation tool, space emails to avoid overwhelming or annoying your prospects. For example, you could try sending follow-ups on the first, third, and sixth day after the initial interaction. Avoid sending multiple emails over days in a row; otherwise, your emails might end up in your prospect's spam folder.

You can also assess whether your cadence should be adjusted with testing. By setting slightly different schedules for the same campaign, you can determine ideal timing factors for your audience. You may learn, for example, that prospects are more likely to respond if you wait two days before sending a second follow-up. Or you might discover that emails sent at 8 a.m. have a higher response rate.

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Save time with templates

One of the most time-consuming aspects of sales outreach is writing emails. But with your automation tool, custom templates can be used to send personalized messages at scale.

Create templates for specific scenarios

Email templates can be used to follow up with entire lists of prospects based on actions they've taken, or their current lead status. For example, you can create a "Follow Up" template that targets leads who've started a product trial.

Templates can also be used to target leads who have gone cold. A "We haven't heard from you in a while" or "Just checking in" follow-up email can be automatically fired off to hundreds of cold leads at once in seconds.

Make it short

The average consumer has an attention span of eight seconds. Keep your lead engaged by keeping your emails 280 characters or less.

Use contractions

Conversational language like "you're" instead of "you are" humanizes your email and makes it sound less robotic.

Don't make it about you

Avoid using phrases like "I wanted," "We believe," and "I've tried." Leads aren't interested in learning about what you've gained—they want to know what's in it for them. Avoid talking about yourself and focus on offering something of value to the recipient. Otherwise, they won't see a point in engaging with it.

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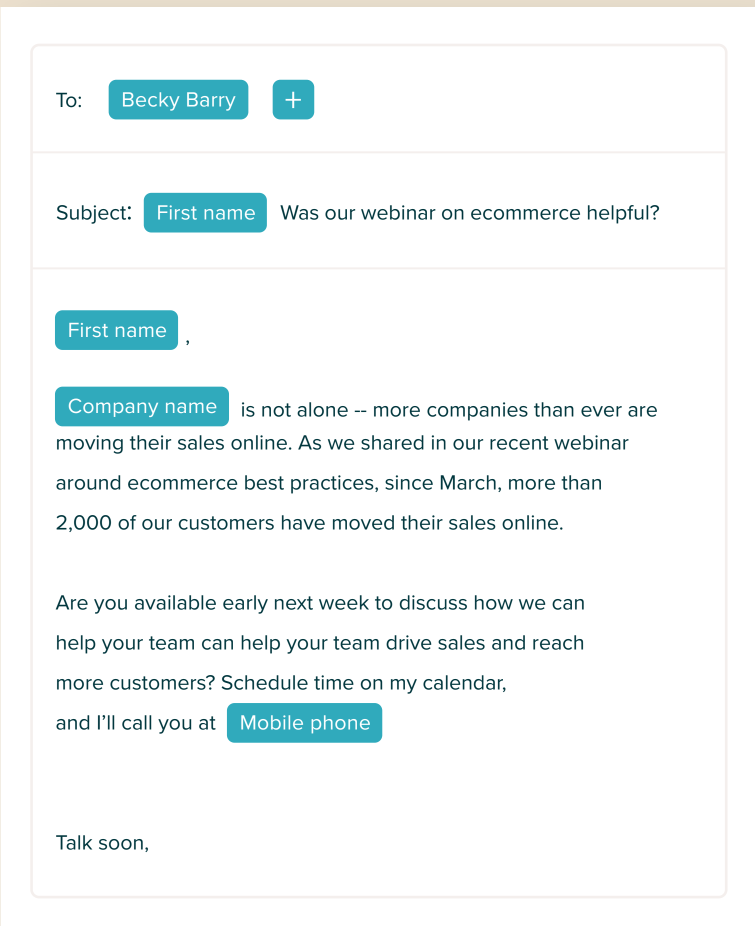
Save time with templates



Personalize outreach at scale with merge fields

Templates are a huge time saver, that's true. But if your email isn't relevant to the lead that receives it, they won't see a point in engaging with it. Luckily, most tools can auto-populate unique information into multiple emails at once, allowing reps to maintain a high level of personalization even while using templates.

Merge fields (sometimes called merge tags) are bits of code that act as placeholders for information. Examples of commonly used merge fields include first name, last name, email, and phone number.

Reps can add custom merge fields to their pre-made templates, allowing them to personalize their sales outreach at scale. After all, personalized emails tend to have a higher click-through rate than generic sales outreach. With an email automation tool, your reps can scale their outreach and improve engagement with leads.

Get started with Reach

Email outreach is a vital aspect of the sales process. It helps reps know which leads are truly interested in buying and keeps leads engaged with your brand, so it's top of mind when they're ready to make a purchase decision.

There's no doubt that sales email automation tools can help reps execute personalized, timely, and repeatable outreach at scale. But not all tools are created equal. Zendesk's sales engagement automation tools are built right into the Zendesk Sell CRM, so they fit into your reps existing workflows and auto-update lead records, eliminating manual work and boosting productivity. These tools are part of the Reach add-on, an all-in-one lead generation and engagement tool that allows sales teams to reach more qualified prospects in less time.

Get started here: zendesk.com/sell/reach

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