Create an Infrastructure for Email Success

The following two blog posts will help you create an email infrastructure that is designed for success:

- [5 Rules for SaaS Email Marketing and Transactional Messages](#)
- [How to keep App-generated Email from Being Marked Spam](#)

Okay, onto the show...

The Rise of the Personal Follow-up Email

The trend around sending a "personal" email from the founder or CEO, a sales person, a customer success rep, etc. after someone signs-up for your app really exploded in 2013.

The reason this became a trend is because, more than anything, it works really well. It works to start a conversation, to get people engaged, and as a customer development tool.

In fact, systems have popped up - like [Autosend](#) - to make this type of thing super-easy to implement.

But over time, two things have happened:

1. The people receiving the messages - especially if you're selling to a "tech savvy" bunch - realize these are automatically generated so the "old way" of just sending a template message immediately after sign-up isn't working like it used to
2. The people and companies that are having massive success with this technique are the ones that have evolved the method over time (I consider myself one of those)

What I'm showing you here - the **"Customer Success Bot"** method - is a variation of this technique that I've used both in my business and with numerous clients with massive success.

What does "massive success" mean? Well, it's all about starting a conversation, and mine was so successful I had to turn it off until I could build some additional logic (geolocation, social profile integration, time of day, etc.) in because it created far too many conversations for me to handle!

But for my clients, at the low-end, 50% engagement (that is, 1 out of every 2 people that receive this email reply back and start a conversation) is easy to achieve, and I've seen "engagement" rates as high as 90% after continual refinement.

Now, what you do with those high engagement rates - close sales, do customer development work, schedule demos, etc. - is up to you.

I can't guarantee you'll have a 90% close rate on new business from this… or that you'll even get 50% engagement… but I'd say you might. And if you're already - or considering - doing "personal outreach" messages, this could be just the thing you need to skyrocket your results.

The Fall of the Personal Follow-up Email

Back in the old days we would immediately trigger a response to the prospect that signed-up for our Free Trial, joined our mailing list, or whatever. This proved to be not so great.

Aside from the fact that we would send a "personal" message at 3AM, the sheer speed with which we reached out was often a dead giveaway that this was automated.

When you include the indicators of an [unsigned email from a third-party system](#), this just smacks of a fake personal email. Yuck.

So then we played with delays… 17 minutes, 1 hour, 1 day… but even though it was better than instantly sending them a message, the standard "I saw you signed-up… welcome!" message wasn't cutting it anymore. People were wising up to this gimmick.

But there's more to it.

Aside from the problems with authenticity, there's something going on with these messages - especially when sent from the CEO - that could be sending the wrong message…

…*it looks like you're just waiting around for people to sign-up!*

Seriously, it looks you're just sitting there watching your dashboard and when a new prospect pops up, you fire off an email.

You see, the typical workflow included a stop - start process that made it appear as if we were waiting for a sign-up and then - when it occurred - we would take a separate action to send the "personal" welcome email.

And of course this would happen at 3AM our time because they're in London and we're in San Francisco.

So it either doesn't pass the Turing test (i.e. it's obviously a bot) or it reeks of desperation. Maybe both.

We need to change things up. We need to do something better. And then it hit me...

A Better Personal Follow-up Email

So I came up with this:

A message that appears to be our reaction to an automated system notifying us of a new prospect that we then forward to the new prospect with a welcome message.

Brilliant (IMHO).

So this way, it doesn't look like we're just waiting around for someone to sign-up and it seems like a 100% legitimate, personal message.

Be careful with this… do it wrong, and you lose credibility… do it right and you might get overloaded with customer conversations (which is probably a good problem to have).

Whatever system you use - or if you roll your own - at the very least you need to be able to send the message during **YOUR** business - or at least waking - hours. If it's between 7AM and 7PM Mon - Sat, send… if not, queue it up and wait until it is.

Of course you may want to put in other parameters, like only responding to people from countries where you wish to do business, or - like I did - checking to see if it's a real - not disposable - email address and then ensuring that it's tied to at least one social profile. I've simply never had any luck with prospects that don't show up in Rapportive... so I automated that rule.

Ensuring that your email infrastructure is in place and that you have the appropriate business rules in place, the rest is about formatting the message correctly.

Infrastructure Considerations
But I can't stress enough… this email MUST appear to be from you. Even better is when it actually is from you.

I used Zapier so that any new subscriptions that came in through GetResponse would send a message directly from my Gmail account - not relayed through their server but a message was created and sent via API. So as far as anyone was concerned, it **WAS** an email from me… even though I didn't manually type it.

That all said, if you have a more sophisticated infrastructure than me - and you probably do - you can and should roll your own system so you can implement the necessary controls and not be limited by send limits. Just be sure to read my posts that I mentioned at the beginning on creating the best email infrastructure to make this happen.

Ethical Dilemma
However you interpret the CAN-SPAM rules (or whatever governs your email sending) is up to you… I chose to not include an unsubscribe link in these emails because - even though automated - this email was not a bulk message and it was as from me as you could possibly get without me typing the message right then.

I also included "Sent from my iPhone" because, well… it appears as if I'm manually writing the message and it just works really well at engaging people. Was I lying? Yes, technically, and now I feel bad for that. My justification was that if I sent this manually, I would very likely be sending it from my iPhone and that would appear on the message.

Automation Rationale
If you think about it, all automation is - or should be - is what we'd do manually if we had unlimited time and resources. I'd love to sit there on my iPhone and respond to everyone if I could… but I can't, so I automated the process.

Also, this message must be sent from the your real email address and that address must be able to receive emails. The main Call to Action (CTA) for this message isn't to

click a link… it's to reply to your message so you can start a conversation. You could get them to take an action in the email, but in customer development and sales conversations, that's not what I lead with.

An open-ended question, their reply, and your response with the link can be much better than just initially sending them a link to click.

Subject Line Psychology
This is where it gets good. Since we're forwarding them a message from an automated system, we get to jam pack the subject line with things that are proven to drive open rates **AND** there's a 100% logical reason for including those. Win-Win.

Remember, the subject line has one job; to get them to open the email.

Since what we're doing is forwarding the message from our "Customer Success bot" to the prospect, the subject starts with Fwd: … this and Re: can significantly boost opens, but when abused it hurts trust… so use this sparingly. I think, in this context, it makes sense for all parties involved.

We also get to include another proven open-rate booster… the name of the recipient. While this is often abused, it's abused because it works. People like to see their names and it gets their attention. Coupled with the Fwd: this subject line will crush.

I like to perform some level of validation - perhaps using the FullContact API - to get more confident on their name before I start using it in my marketing. If you can't do that or don't want to, you might at least pass it through a profanity checker like WebPurify so you don't forward an email with obscene words in the subject.

If you can't get a good name from them, just modify the messages below to exclude the name… it might not work *as* well, but I suspect it'll still do better than what you've been doing.

When to Send?

Notice that I mentioned timing above... we tried 17 minutes post-signup, 1 hour... 1 day, etc. You'll see in the examples below we even used this method on Day 10, too.

Ultimately, timing is something to test, for sure. I don't know what will work best for your audience, but to ensure you start testing from a solid baseline, really think about the person you're emailing.

What are their expectations, goals, needs, dreams, wants, desires, fears, etc. No really... think about that more than anything else. Get inside their head. Understand them better than they understand themselves... and then start testing from there.

So I don't know what the best timing for this will be for you, though I can say a demo request will likely require a different response time than an email list sign-up and those will differer from a follow-up to a Free Trial sign-up.

Remember that follow-up timing will also be affected by whatever rules you have in place, like only sending during local business hours. It may even be affected by what actions the prospect has taken in-app (i.e. don't send a personal follow-up if they've already completed the CCA's... just make an offer to get 'em to convert).

Message Format

Now, as for formatting, this message ***MUST*** be sent as a plain text or as a plain text-looking HTML email as if it came from the person sending it.

In other words, while you might personally send rich emails that use colored font and an image in your signature, it still looks like an email from a person.

That's what we're going for here… not a newsletter. Not an overly-designed email that clearly no actual person would send to another person. If you wouldn't type it up and send to someone you know, don't use it here.

Keep the email short, sweet, and end it with an open-ended question (not a yes or no question) that will cause them to respond with something meaningful that we can build the conversation off of.

It's harder to ignore an open-ended question (I think science backs that up, but for the skeptics, we'll just say this is my observation) and we're trying to start a conversation… yes or no questions don't lend themselves to deep understanding and meaningful conversation.

<p align="center" style="color:red">Examples start on the
next page!</p>
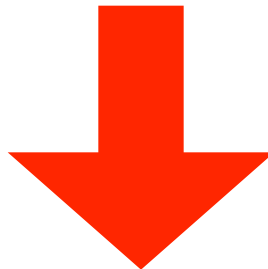
"Customer Success Bot" Method Examples

Alright, here are some ways to use this method, but I encourage you to use your imagination…

From: Sara @ MyLMS <support@mylms.app>
To: <fname> <lname> <emailaddress>
Subject: Fwd: [New Member] <fname> <lname> signed-up to try MyLMS

<fname>,

I noticed that you signed-up for a free trial of MyLMS, so I thought I'd say hello, and see if you need assistance getting started with MyLMS (yes, even during your free trial!)

Also, I'm curious... before you found MyLMS, what were you using to deliver your training courses?

Welcome aboard,

Sara Smith
MyLMS Customer Success Team
(123) 414-9999

---------- Forwarded message ----------
From: MyLMS System <system@mylms.app>
Date: Sat, May 20, 2013 at 11:39 PM
Subject: [New Member] <fname> <lname> signed-up to try MyLMS
To: support@mylms.app

Sara, I wanted to let you know that <fname> <lname> signed-up to try MyLMS

++ MyLMS.app System Message

Subject: Fwd: <fname> <lastname> requested an EZFinder Demo

Hi <fname>,

I saw that you requested a demo of EZFinder and wanted to let you know that Dave - your account exec - will contact you shortly.

By the way, <open-ended question>?

Cheers!

Patricia Smith, President
EZFinder

Sent from my iPhone

---------- Forwarded message ----------
From: EZFinder Customer Success bot <success@ezfinder.app>
Date: Sat, Apr 20, 2013 at 11:39 PM
Subject: <fname> <lastname> requested an EZFinder Demo
To:

Patricia, I wanted to let you know that <fname> <lname> requested a demo.

Thank you,

EZFinder Customer Success bot
#end transmission#

Subject: Fwd: <fname> <lastname> is 10 days into their trial

Hi <fname>,

I saw that you're well into your Free Trial of AnotherLMS and I thought I'd check in with you to make sure you've got everything you need to properly evaluate AnotherLMS and that you don't have any questions or haven't run into any issues.

By the way, <open-ended question>?

Don't forget that if you need anything, have any questions, or if you'd like me to give you a demo of any part of AnotherLMS, just let me know.

Ciao!

Sandy Pierce
AnotherLMS

---------- Forwarded message ----------
From: AnotherLMS Customer Success bot <success@anotherlms.app>
Date: Sat, Apr 20, 2013 at 11:39 PM
Subject: <fname> <lastname> is 10 days into their trial
To: nancy@anotherlms.app

Nancy, I wanted to let you know that <fname> <lname> is 10 days into their trial of AnotherLMS.

Cheers,

AnotherLMS Customer Success bot
++ Ciao!

About Lincoln Murphy

My name is Lincoln Murphy. I help SaaS and Cloud companies acquire and keep more customers so they can grow rapidly and profitably. Learn about my customer acquisition & churn reduction consulting, follow me on Twitter @lincolnmurphy or G+, or email me anytime.