

# Cheat Sheet

## 20 WAYS TO PERSONALIZE AUTOMATED EMAILS

Be sure you have a complete and clear data set of all your lead and client information ready to go early on. This is the biggest step in the process, and you can speed up the rollover by having that information ready up front.

### 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