

# Personalization at Scale

A Salesperson's Guide to Reaching  
*More Prospects, More Effectively*



# How many times have you heard that sales is just a numbers game? The more people you talk to, the more deals you'll close...right?

That's certainly true to some extent, but we all know it's not quite that simple. At some point in their careers, almost every salesperson has reached out to a big list of prospects and received little to no response. Most have also been able to turn a small number of high-quality conversations into big wins.

So what's the difference between those scenarios? Sometimes, it's the quality of the prospects you're reaching out to. But often, it's the message. When we're engaging with just a few potential buyers, we naturally tailor our message for them and their needs. But when it's time to go after a big list, we break out the templates.

There's nothing inherently wrong with templates. Oftentimes, it would be impossible to hit our quotas or increase our numbers without them. The problem is with templates that make your cold outreach feel, well, *cold*.

When templates aren't personalized, they simply don't work as well. But tailoring your messages just a little can have a big impact. In a recent [SalesLoft study](#), they found that when salespeople customized 20% of their emails — just one sentence in a 5-sentence email — open rates increased over 40% on average and reply rates increased 112%!

Despite the significant increase in response that personalization can generate, most salespeople still send



By customizing emails, salespeople found a

**40%**

average increase in open rates

**AND**

reply rates increased by

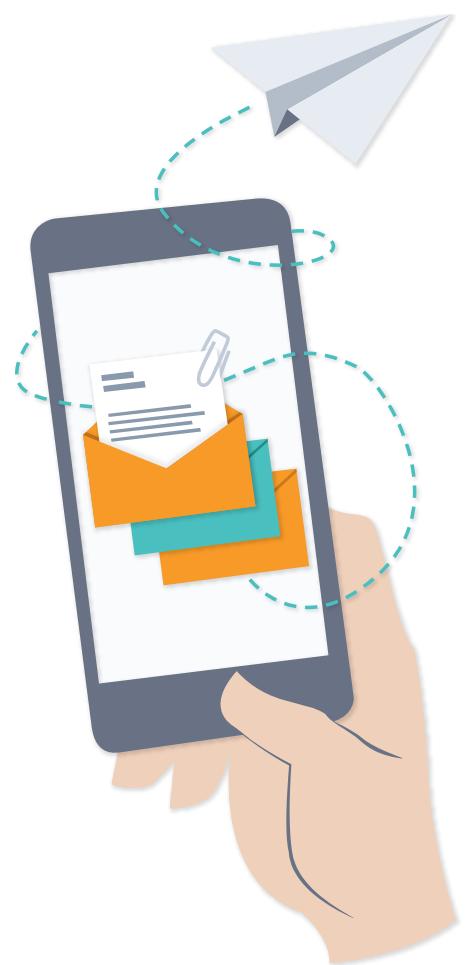
**112%**

templates without making any changes. For example, more than 80% of the templated sales emails [sent using HubSpot](#) have 20% or less of their content customized.

That's not all that surprising when you think about it. Templates were designed to help us reach out to more people, faster. Customizing every email before you send it takes time – customize them too much and it begins to defeat the purpose of having templates at all. But that 112% increase in reply rates means that personalizing your sales messages a bit is worth it even if you only send half the emails you would otherwise.

To find that sweet spot between quantity and quality, you'll need to personalize some, but not too much. That same study from SalesLoft found that improved performance slows dramatically after personalizing more than 20% of an email. Change more than 80% of the content, and the email may actually perform worse than just sending a template as-is. In other words, you need more than the automated {first name} and {company name} tokens, and less than a full rewrite before every click of the 'send' button.

The best option is to develop a process that allows you to personalize a portion of your sales messages quickly. **In other words, you need a way to personalize at scale.**



# The Key to Success: The Right Templates + The Right Technology

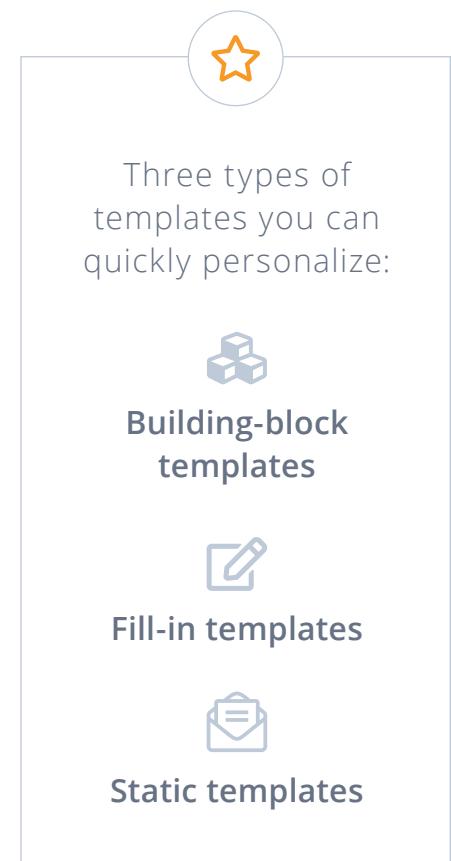
Success with personalization at scale all comes down to the templates you start with and the technology you use to store and use them. To be successful, your templates and technology should be designed for customization and flexibility.

There are three types of templates you can use to quickly personalize your sales messages:

- **Building-block templates**
- **Fill-in templates**
- **Static templates**

No single type is always better than another — you'll want to tailor your approach to the situation. And, for some messages, you may even combine a couple of them for the best results.

We'll cover each of these template styles in a moment, but first, a word on the technology you use to store and use your templates. You can always use templates by simply copy-pasting from text documents where your





templated content is saved, but this can quickly get messy and time-consuming.

Another option is to use template tools built into your CRM, email client, or other existing software. However, these too have their limitations. Those tools often don't work unless you're using that software to send your messages – for example, you may not be able to use a CRM template as a LinkedIn message or an email client template as a response to a prospect's text message. Depending on how advanced the template features are, you also may not be able to easily create fill-in templates or use multiple templates in the same message as the building block method requires.

TextExpander was designed to solve these challenges to make personalizing your templates a breeze.

TextExpander allows you to save 'snippets' of text, and quickly insert them anywhere you type with a simple abbreviation or in-line search. With TextExpander for Teams, you can even share your templates and other snippets across your sales team or even your entire organization. For each of the following template styles, we'll show you how TextExpander makes them quick and easy to create and use.



TextExpander was designed to solve the challenges associated with building templates and to make personalizing your message a breeze.



# Building Block Templates

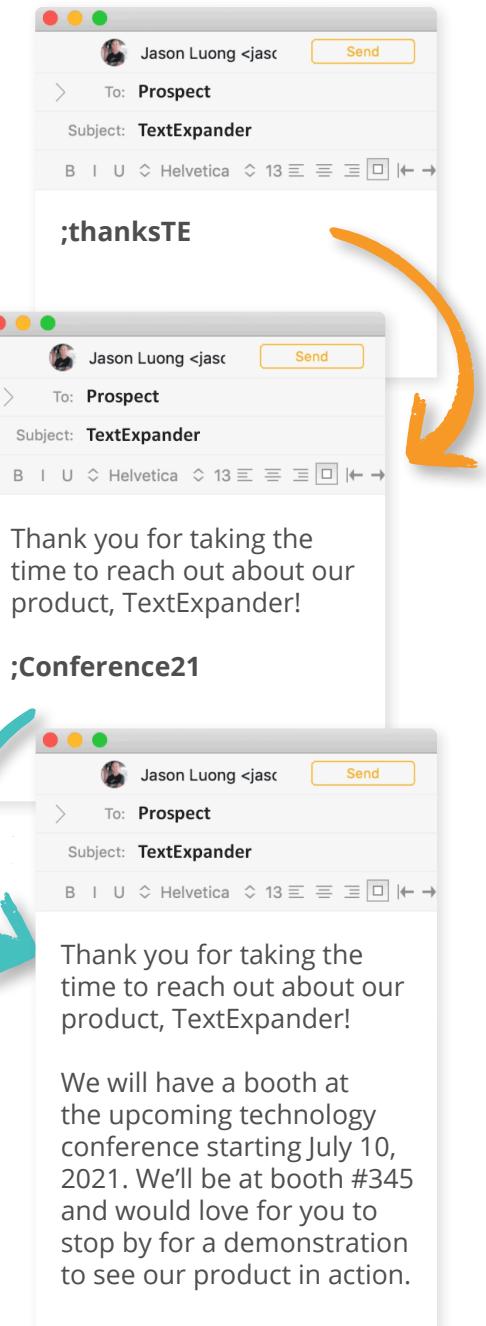
The building block method is the practice of creating multiple short templates, then 'building' full messages by combining them.

You may have a few different email greetings you like to use in different situations, some different intro paragraphs, a few closing calls to action, and some sign-offs. With the building block method, you'd save each of your greetings, each of your intro paragraphs, and so on, as separate templates. Then, for each email, you simply pick the best template for each component, allowing you to quickly craft a message that's highly relevant to the prospect.

This method is best when you need to send a large volume of emails very quickly or when everyone you're reaching out to is fairly similar.

For example, you could use it to quickly follow up with leads from a trade show. You might have a couple of different intro building blocks reminding them how you met (conversation at your booth, conversation at their booth, met on the exhibition floor, etc.), another set of blocks for the common pain points you heard from people at that show, and another for different calls to action based on how warm they are. You could do all your follow-up in one day, while still ensuring that each message feels personalized to the recipient.

With TextExpander, the building block method is super easy. All you have to do is save your template blocks as TextExpander snippets. Then, type the abbreviation for each block you want to insert, review, and hit send.



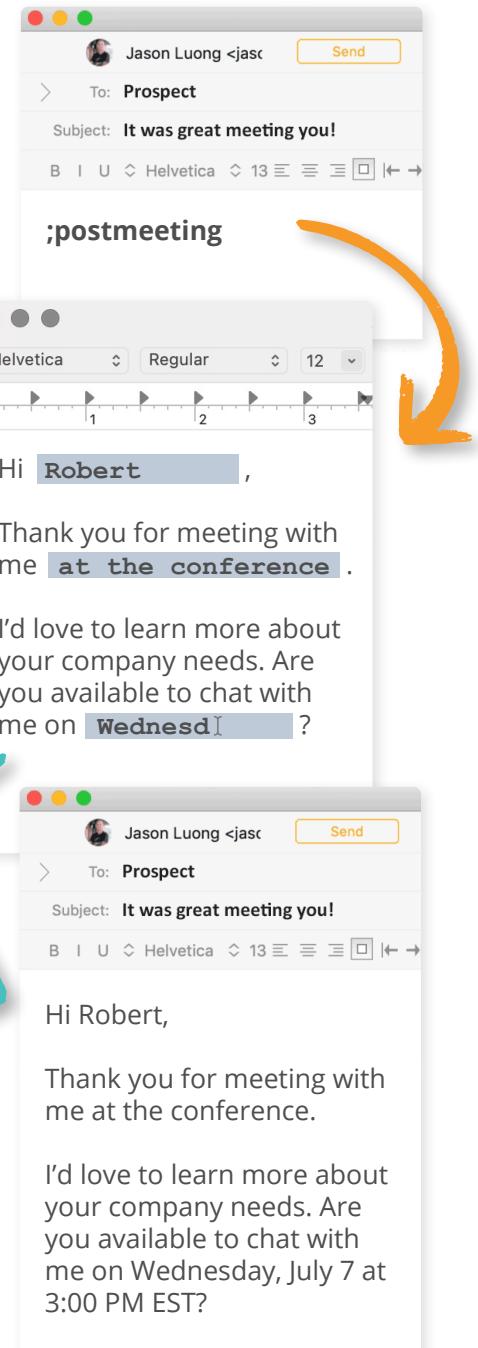
# Fill-In Templates

Fill-in templates are templates designed to be customized. The template has the majority of the content pre-defined, but leaves openings for the parts of the message you'll know you want to customize.

This type of template can be more rigid or more flexible, depending on how many 'fill-in' areas you have and how much content you expect to put in each of those areas. But the nice thing about them is that you can design them to meet that 20% personalization benchmark we discussed earlier.

Fill-in templates work well in situations where there's one or two specific parts of your template that would benefit from personalization. For example, you may leave a fill-in area in the intro of a cold email to add a relevant hook based on your research – such as a mutual connection or a relevant news article. Or, you may use fill-in areas to add custom action items to an otherwise-standard follow-up message you would send after a meeting.

With TextExpander, you can create fill-in fields in any of your saved templates. Then, whenever you use a template that contains a fill-in field, a pop-up will allow you to type whatever you want into that field before it inserts into your message. Not only does this allow you to customize your templates faster, it also ensures you'll never send an embarrassing message that still contains your fill-in hints. Nobody likes getting an email that starts out with "INSERT INTRODUCTION HERE."



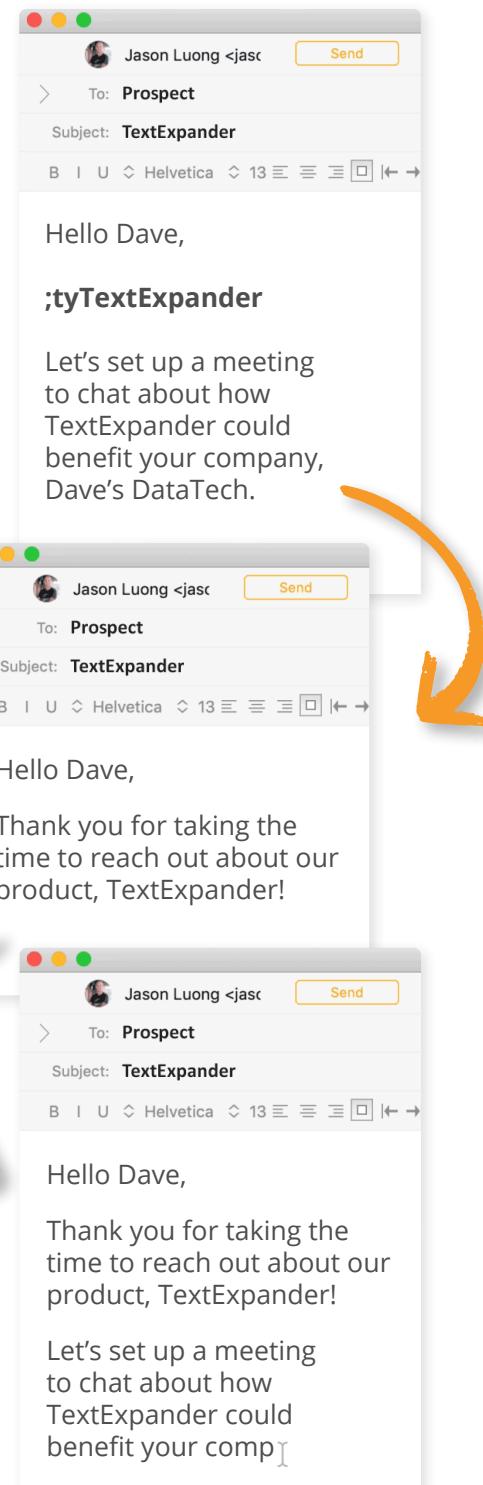
# Static Templates

Static templates are the templates you're probably most used to. They have the entire message all typed out, and could be sent without any editing. As we covered in the intro, these templates aren't usually anywhere near as effective as their personalized counterparts. Still, they're shared by sales managers and marketing teams all the time.

Static templates may work in some very specific situations when the recipients are all very similar or all care about very similar things. For example, a static follow-up may be okay to offer a quick connect call with someone you've never met who just signed up for a free trial of your product.

But in most cases, your best bet is to edit these static templates before sending. When doing so, just remember that 20% sweet spot. Find one or two things in the email that could be more relevant to your prospect or consider adding a small bit of relevant content.

With TextExpander, editing static templates is as simple as editing any other text. As soon as you insert a saved snippet, the text will appear in your application for you to edit however you see fit before sending it off.



# Creating the Best Messages

Part of the challenge with sending lots of personalized messages is knowing what to say in the first place. It's a lot easier to send a pre-written email than it is to figure out what to add or change to make it more relevant to the person you're sending it to. So, a crucial element of personalizing at scale is quickly figuring out what to say in the first place.

Unfortunately, there's no silver bullet for this. Sending great sales messages requires a solid understanding of your prospects and a fair bit of trial and error. To gain those insights faster, we recommend leaning on your marketing team and other salespeople who are seeing success.

With TextExpander for Teams, you and your colleagues can share the templates that are working well. And if you're ever curious about which templates people are seeing success with, you can even see what's being used most often in the team-wide statistics dashboard.

With that said, there are a few best practices to keep in mind as you personalize your sales messages:



Sending great sales messages requires a solid understanding of your prospects and a fair bit of trial and error.



## Sound like a human.

Most people don't want to talk to a robot, and they *really* don't want a sales pitch from one. If you're going to take the time to personalize your messages, make sure they don't come out still sounding automated. Don't be afraid to incorporate your personality and use casual-yet-professional language.

## Keep it short.

Your message needs to be long enough to get your point across, but not so long that it's a burden to read. A [study by Boomerang](#) of over 40 million emails found that the ideal email length is between 50 and 125 words. Keep your message concise and remember that saying one thing well will always perform better than saying many things poorly.



The ideal length of an email is between

50-125 words.

## Focus on them.

There's a good chance that most people don't really care that much about your products or services, or whether you hit your quota this month. People generally buy things because of how they affect them, and that's just as true for luxury vehicles as it is for insurance or B2B software. To make your message resonate with the reader, make the message about them – *especially* the first sentence or two.

A quick tip is to count how many times your message includes words like "you" and the recipient's name, and make sure there's more of them than words like "we" or "I."



# Do your research, but not too much of it.

To personalize a message effectively, you have to know a bit about your prospect. But spending an hour on research for every message isn't scalable. Rely on tools like [LinkedIn Sales Navigator](#), [Crystal](#), and good old Google to find relevant information about people quickly. And if your target buyer doesn't have much of an online presence to go off of, some research on their company or an industry news headline should do the trick.

## Rely on a proven framework.

There are a ton of sales message frameworks across the web that various salespeople have found success with. For example, the [SP3O](#) method by Dan Murphy of the sales training company, Sales Geek, is a great way to ensure you're covering what you need to:

**S**

**Situation.** Identify a situation that makes the email feel relevant. Basically, it's the reason you're reaching out to them now. For example, if you're a roofing company making sales after a storm, the storm is your situation. This is where your research may come in handy.

**P**

**Problem.** Be clear about the problem that situation causes for the prospect. In our roofing example, damaged roofs are the problem.

**3**

**3rd Party Success.** Build some trust by showing the recipient that you've already solved this problem well for someone like them.

**O**

**Offer.** Offer to solve your prospect's problem. This puts you in the position of offering to help (by way of your product or service) rather than *asking* someone to do something for you.



# Putting It All Together

Finding that sweet spot between fully custom sales messages and generic-sounding templates will allow you to send a high volume of messages that have a solid chance of generating a response.

Create the templates you need – building blocks, fill-in style or static – then master the skills of quick personalization based on our tips and what's worked well for you and your team. Your templates will help you scale, and the personalization will help you close.

**Finally, get the right tool for the job to make managing it all much easier.**

“

*“A tool like TextExpander that can make you more efficient in a role where you get paid based on how much you sell is immensely valuable.”*

**Brian Deighton**

Senior Inside Sales Representative, CompanyCam



**Try TextExpander free for 30 days to see just how much it can help you and your team reach more prospects more effectively.**

[SIGN UP](#)

