

# PERSONALIZATION AT SCALE



How to Customize Your Follow-Up  
Strategy to Attract More Customers

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## MEET BECC HOLLAND



Becc Holland is the Head of Sales Development at Chorus.ai. Her sales career started when she became an account executive straight out of college. Since then she has taken the sales world by storm quickly rising the ranks at Gong.io, G2, and now Chorus. Becc is currently professing her Flip the Script thought leadership piece, showing sales people all over how to effectively executive a cold call.

## OVERVIEW

The days of email mass blasts and other client outreach methods that lack customization are drawing to a close. At this point, there are still quite a few holdouts who fear customization at scale because they worry it will damage company uniformity. Having different reps from all over deviate from a script and talk to different customers (or potential customers) in different ways can't be a good for maintaining a consistent voice, can it?

The answer is no, not necessarily. But salesmanship is changing and evolving in the age of social media, and people are starting to care more about personalized appeals than a consistent brand voice.

To help you make this transition cleanly and effectively, I will discuss how to personalize outreach in an effective way that will draw in customers. Then I'll talk about how to scale that customized outreach.

## PART ONE: CUSTOMIZING OUTREACH

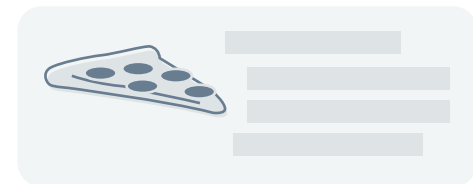
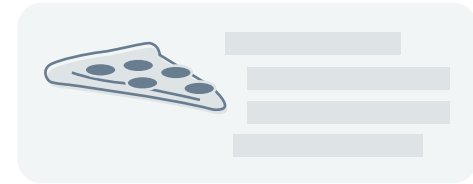
The “traditional” model for customizing outreach is called the *ten-eighty-ten* model. It assumes that the first ten percent of outreach should be customized. That is basically limited to the salutation and maybe the first line of an email. Something like *“Hi Matt, I saw on your blog that you like pizza.”*

After that, according to the *ten-eighty-ten* model, you launch into your stock sales pitch, which is exactly the same for everyone. And then finally, the last ten percent is customized too. Something else about pizza, maybe.

Lots of companies have caught onto the fact that looking at online communities is a good way to obtain names to send “customized” outreach to, but that’s as far as it usually goes. They use that community’s focus as fuel for the first and last 10% of the outreach for the people in the community, and that’s it.

Years ago, I decided that model wasn’t enough to really catch the interest of a VP of marketing or director of sales who’s probably too busy to spend time on fairly important tasks, let alone read mass blasts.

So it took me a while, but I developed a few rules to do customized outreach differently. Here they are.



# THE FIVE PREMISE BUCKETS

First, I identified every effective way to “hook” someone with a personalized outreach. Think of them as conversation points that get the other person invested right away. I identified 17 premises you can use to reach out, and I grouped them into five categories, which I call “premise buckets.” In order from most engaging to less engaging, the categories are:



## 1 SELF-AUTHORED CONTENT

People love hearing praise for the content they spent some time and effort on, so their ears perk up when someone mentions something they wrote. Self-authored content includes webinars, articles, and posts. This gets a huge amount of response if you do your homework and actually summarize the content in your outreach.



## 2 ENGAGED CONTENT

Even though the person being contacted did not produce the content themselves, they did engage with it. They saw it and spent time expressing interest, even if that time consisted of nothing more than reading a headline and clicking the “like” button. And people feel flattered when they learn others are paying attention to their social media activity, however inane it may be. Engaged content outreach may focus on social media likes, shares, or comments.



## 3 SELF-ATTRIBUTED TRAITS

People love to know others are paying attention to them, even in a cursory way. So mentioning something you saw about someone online in a positive light is a kind of in. For this kind of outreach, you might comment on the info you read in someone’s profile line, headline, or company line on a social media site like LinkedIn or Instagram.



## 4 JUNK DRAWER

This is one of the five buckets that are not really unique to the person being reached, along with bucket number five. So it should only be reached into if you come up empty for the first three. It covers stuff like the person’s schools, interests, or hobbies. Note that, if you choose to go this route, it’s important to compensate for the slightly impersonal nature of the “hook” by constantly expressing interest in the chosen premise throughout the communication.



## 5 COMPANY

This is the least personal of the five buckets, but it can still work in a pinch. For this type of outreach, you mention the info you read about the person's company and were impressed by it. Things like company mergers and acquisitions, posts, blogs, hiring ads, or website language. You can't be too general, though, like *"Hey Matt, I noticed your company is growing."* That sounds like the intro to a stock outreach message. Instead, try something specific, like *"Hey Matt, I noticed your company has grown by 93% over the last six months and you just added a new VP of sales."* Show that you actually care about what they do.

# IN PLAYBOOKS™

In your CRM you can build the 5 Premise Buckets directly into your record layout. this will allow you to customize each record using any (or all) of the 5 premise buckets.

The image shows a CRM interface split into two parts. The left part is a 'Contact Detail' page for Matt Langie, CMO of XANT. It includes contact information (phone: (555) 555-5555, email: mlangie@XANT.ai) and a 'Personalization' section with 3 items. The right part is a mobile task interface for 'Other Task' showing an email draft to Matt Langie. The email content is: 'Your Personalization at Scale attended & \_\_\_\_, Matt! Hi, Matt, Reason for my outreach is I noticed you attended our Personalization at Scale Webinar but more importantly I saw that you .... With Your Success in Mind, Becc'.

Personalization Item	Company
Self - Authored: LinkedIn Article Title	Company: LinkedIn Post Premise
Self - Authored: LinkedIn Article Excerpt	Company: LinkedIn Post Excerpt
Self - Authored: Webinar Title	Company: Blog Post Title & Premise
Self - Authored: Webinar Excerpt	Company: Blog Post Excerpt
Self - Authored: LinkedIn Post Premise	Company: Growth % or Headcount
Self - Authored: LinkedIn Post Excerpt	Company: Website Language Premise
Engaged Content: Shared Author & Premise	Company: Website Language Excerpt
Engaged Content: Shared Excerpt	Postbound Mention: Webinar Attended
Engaged Content: Commented On Author & P	Postbound Mention: Webinar Registered
Engaged Content: Commented on Excerpt	Postbound Mention: Content Download
Engaged Content: Liked Author & Premise	Postbound Mention: Event Attended
Engaged Content: Liked Excerpt	Postbound Mention: Demoed in the Past
Self Attributed Traits: Profile Line Pre	Postbound Mention: Past User
Self Attributed Traits: Profile Line Exc	Postbound No-Mention: Buyer Intent
Junk Drawer: Prospect School Attended	Postbound No-Mention: Company Funding
Junk Drawer: Prospect Hobby	Postbound No-Mention: Email Opens
Junk Drawer: Personal Interest	
Junk Drawer: Social Media Post Premise	
Junk Drawer: Social Media Post Excerpt	

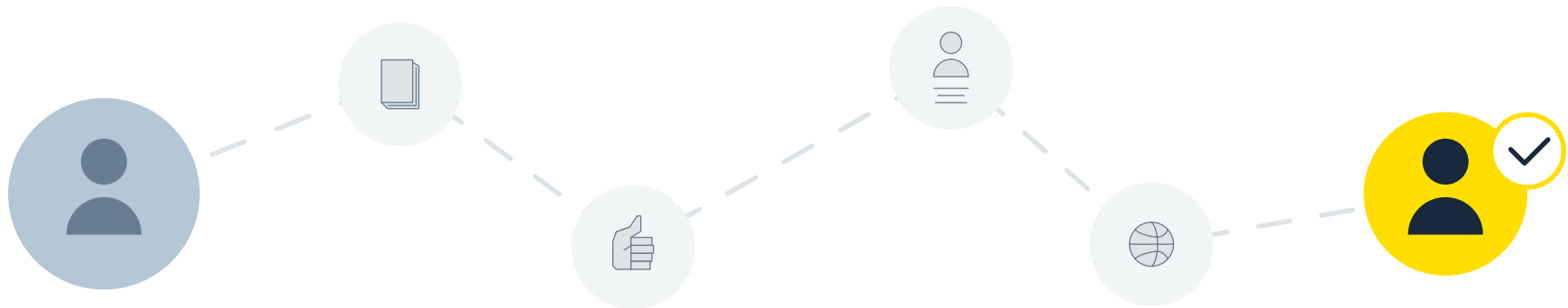
## REACHING OUT TO THE RIGHT PEOPLE

It's all very well and good to reach out to total strangers with customized outreach, but people who have already expressed interest in you or your company are the real goldmines. I'm talking about contacts acquired through white paper downloads, ebook downloads, resource downloads, webinar registration, conference attendance, or mutual connections.

When you find someone you know is interested, you have to use finesse. Don't just say *"Hi Matt, I saw you attended my conference. Do you want a demo?"* It's too blunt. And more importantly, it doesn't sound personal at all. Instead, try to link your shared history to one of the "premise buckets" mentioned above. The result is pure gold. My idea of a nearly flawless personalized outreach would start something like:

*"Hi, Matt. I notice that you attended the Personalization at Scale webinar. But more importantly, I saw that you wrote this article the other day on scaling effective teams. One line that stood out to me was bla bla bla bla..."*

From that point on, they're hooked.





## PART TWO: COMPOSING RULES

The main reason a lot of companies are afraid to customize their outreach, especially to the degree I'm describing, is that they feel their representatives will never be able to maintain consistency. They feel they have to provide a stock outreach template with very little opportunity for customization. Because otherwise, they think, their reps will write emails that aren't uniform at all.

That worry can be laid to rest, though, with templates that dictate a certain structure for ideas rather than specific content.

### THE WILEY COYOTE MODEL

The idea was inspired by Chuck Jones, of all people, creator of the Wiley Coyote-Roadrunner cartoons. He came up with this great concept but he was busy on so much stuff that he couldn't draw or storyboard all the episodes himself. Other people were to do it, but he wanted to keep the concept consistent. So he created a framework of rules that should always be kept in mind when making new episodes.



#### RULE 1

The Road Runner cannot harm the Coyote except by going "Beep-Beep!"

#### RULE 2

No outside force can harm the Coyote - only his own ineptitude or the failure of the Acme products.

#### RULE 3

The Coyote could stop anytime - if he were not a fanatic.

#### RULE 4

No dialogue ever, except "Beep-Beep!"

#### RULE 5

The Road Runner must stay on the road - otherwise, logically he would not be called Road Runner.

#### RULE 6

All action must be confined to the natural environment of the characters - the Southwest American desert.

#### RULE 7

All materials, tools, weapons, or mechanical conveniences must be obtained from the Acme corporation.

#### RULE 8

Whenever possible, make gravity the Coyote's greatest enemy.

#### RULE 9

The Coyote is always more humiliated than harmed by his failures

# EMAIL STRUCTURE

Following that example, I created a framework and structure for all of my reps to stick to when writing customized emails. The structure I came up with consisted of these three parts:

## 1 PREMISE

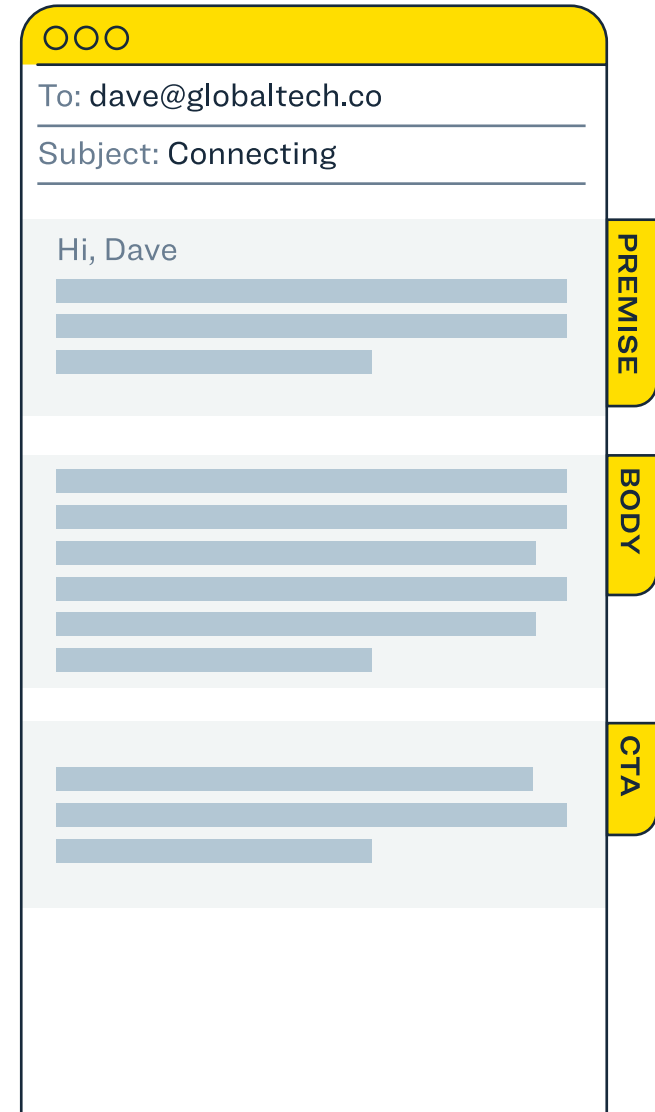
This should be the longest of the three parts, probably three to four lines. It's by far the most important part to get right, because it will either hook the recipient or lose their interest. I went over the premise in detail already, though, so I won't get too far into it here.

## 2 BODY

This should be of medium length, maybe two or three lines. It needs to link the premise back to your company. So if your premise mentions how you saw Matt's recent post about healthy workplace habits, make a convincing case that links that topic back to your company. Or if your premise was that Matt went to Texas A&M, you have to link the college or its mission statement to your company. Basically, you want to smoothly transition from the attention-grabbing premise to part three, which is really what you're sending the email for.

## 3 CALL TO ACTION

This is the shortest part. Limit it to two lines. You should ask once, and only once, if the reader might be interested in your service. Another trick, promise to stop emailing if you get just a few minutes of their time. Something along the lines of "maybe we can meet on Wednesday at 2 to discuss some options, and if you're not interested then we'll part ways as friends."



Most people don't realize this, but readers usually glance at the intro and the final paragraph before reading the body of an email. So it's important to make your CTA unassuming and polite, so that the recipient will be coaxed into reading the body too.

Once I devised this template, I went with people who could really bring the premise and whatever followed to life -- creative writers. I didn't need professional marketers who knew how to structure the emails, because I had already done that and I made sure anyone I hired was familiar with the format I had devised. So my company's emails stood out, because they had a distinct "pop" that competitors didn't have. They were also formatted correctly, even without me looking at all of them.



# DOS AND DON'TS FOR CUSTOMIZED OUTREACH

Of course, I also had to put together a few guidelines for the actual content. So I put together the dos and don'ts my writers needed to keep in mind when composing outreach emails.

## DOs

### **1 PROSPECT-CENTRIC**

The email should have far more content about the recipient than the person or company sending it.

### **2 PAIN-CENTRIC**

You don't need to talk about what you can do for the recipient. Everyone's talking about what they can do. It's played out. Instead, talk about what pains you can alleviate. It's more relatable, and it's more prospect-focused by nature.

### **3 PRIDE-ADVERSE**

Don't act like you are above the recipient. In fact, act like you're below them. Let them know your company is fallible, but you're trying your best and you'd be privileged to work with the prospect.

### **4 FLUIDITY**

This is about connecting your premise to your body and your CTA seamlessly. It's easy in theory, but actually really hard to do for most people. Which is why I hired creative writers; they're good at it.

### **5 RELEVANCE**

I make sure all my writers know the buyer personas we work with, and the buttons to push for each of those different personas. They can determine a persona for each contact they reach out to, and then they know a few points to hit.

### **6 BREVITY**

One of the basics of good writing is to omit unnecessary words. This is especially important in outreach emails, since most readers will only spend a few seconds scanning. Make sure the writers know this.

## 7 NOTICABILITY

Get their attention as soon as possible. Obviously don't use bait and switch, but use a catchy subject line and make your opening few words extra eye-catching. And then there are the no-nos, or, as I call them, the seven deadly sins of messaging.



## DON'Ts

### 1 BEING TOO CASUAL OR SILLY

Things like GIFs, memes, and emojis.

### 2 WASTED TEXT

Things like "So the other day I was thinking that..." or "I just wanted to check that you are..."

### 3 BEING THE AUTHORITY OVER THE PROSPECT

Don't act use language that suggests you're doing the recipient a favor by letting them in on this opportunity.

### 4 QUESTIONING THE PROSPECT'S AUTHORITY

Don't say things like "I don't know if you'll be able to answer this for me, but..."

### 5 MAKING YOUR PROSPECT UNCOMFORTABLE

Never criticize the past actions or decisions the recipient has made.

### 6 MAKING YOUR PROSPECT FEEL STUPID

Phrases like "Understand?" or "Does that make sense?"

### 7 GLORIFYING YOURSELF

Again, don't talk up yourself or your own company. Save that for the prospect, as long as the praise is warranted.

## MODIFYING THE STRUCTURE FOR COLD CALLING

A lot of the same principles that should be present in customized outreach emails should also apply to cold calls. Right off the bat, you want to connect with the other person. Show them that you know of them and establish an instant rapport.

This would be a great cold call structure, for instance:

“Hey Matt, how are you doing today...

Hey, the reason for my outreach is I saw this article that you wrote on LinkedIn the other day where you’re talking all about personalization at scale and whether it’s doable. One line that really stood out to me is ‘you have to be genuine when you’re talking about personalization to your buyer.’

So I was curious to know if you’ve come across our course before?”

At that point, you’ve hopefully got them hooked with personal appeals, like in the premise of an email. You can then launch into the “body” of the call, which is where you get the prospect to agree to listen to you. I like to sum this part up in four steps, modified for the cold call format.

### 1 COMMITMENT

This is to make sure they stick around, even though you’re not talking only about them anymore. Ask them for a few seconds of their time to make sure they know you’re not about to talk their ear off.

### 2 AGENDA

Tell them why they should give you a few seconds of time. This is where you need to establish the relationship between what your own company does and what their company needs done.

### 3 OUTCOME

Reassure them again that they are in control after graciously giving you 30 seconds, or however long you think you need.

### 4 CONSENT

Ask if this little 30-seconds arrangement sounds agreeable.

From there, launch into the most important 30 seconds of the call. This 30 seconds needs to tell the prospect what your company does and exactly what needs you can fulfill. It should adhere to the dos and don’ts I discussed earlier in the emailing structure section.

**IN PLAYBOOKS™**

In Playbooks™ you can pull any field from your CRM and use them as merge fields in your various plays. Therefore, you can build a script using these best practices to incorporate your personalization points.

The image displays a CRM interface on the left and a mobile task card on the right. The CRM interface shows a list of personalization fields under the heading 'Personalization' with a score of 3. The fields include various CRM attributes like 'Company: Company M&A Details', 'Self- Authored: LinkedIn Article Title', and 'Engaged Content: Shared Author & Premise'. The mobile task card is titled 'Other Task' and is for a contact named 'Matt Langie', CMO of XANT. The task is 'Email Gabe' and is due today. The email content is personalized, mentioning 'Your post on Personalization & Becc Holland...' and 'Hi, Matt, Reason for my outreach is I really enjoyed your LinkedIn post on the importance of personalized outreach & how you can't fake it, especially when you said, "Becc Holland is the queen of personalization."'.

Personalization	
Personalized Score 3	
	Company: Company M&A Details
Self- Authored: LinkedIn Article Title	Company: LinkedIn Post Premise
Self Authored: Linked Article Excerpt	Company: LinkedIn Post Excerpt
Self- Authored: Webinar Title	Company: Blog Post Title & Premise
Self - Authored Webinar Excerpt	Company: Blog Post Excerpt
Self - Authored: LinkedIn Post Premise	The importance of personalization and how you can't fake it
Self - Authored: LinkedIn Post Excerpt	Becc Holland is the queen of personalization and she's joining me to talk live about personalization at scale.
Engaged Content: Shared Author & Premise	Company: Website Language Excerpt
Engaged Content: Shared Excerpt	Postbound Mention: Webinar Attended
Engaged Content: Commented On Author & P	Postbound Mention: Webinar Registered
Engaged Content: Commented on Excerpt	Postbound Mention: Content Download
Engaged Content: Liked Author & Premise	Postbound Mention: Event Attended
Engaged Content: Liked Excerpt	Postbound Mention: Demoeed in the Past
Self Attributed Traits: Profile Line Pre	Postbound Mention: Past User
Self Attributed Traits: Profile Line Exc	Postbound No-Mention: Buyer Intent
Junk Drawer: Prospect School Attended	Postbound No-Mention: Company Funding
Junk Drawer: Prospect Hobby	Postbound No-Mention: Email Opens
Junk Drawer: Personal Interest	
Junk Drawer: Social Media Post Premise	
Junk Drawer: Social Media Post Excerpt	

## PART THREE: SCALING PERSONALIZED OUTREACH

So this is very well and good, but how do you do this process if you're reaching out to a massive number of people, all with different interests and preferences?

The first question I always ask is, "What kind of operation do you want to scale?" Emailing? Cold calling?

Depending on what the answer is, I'll propose a different set of "rules" like those outlined above. I'll create a template for these rules, and I'll use it to train the reps.

I'll also make sure the reps know the seven pillars and seven deadly sins of messaging backward and forwards. Of course, they may be modified slightly depending on the medium being used and what exactly the company wants to do.

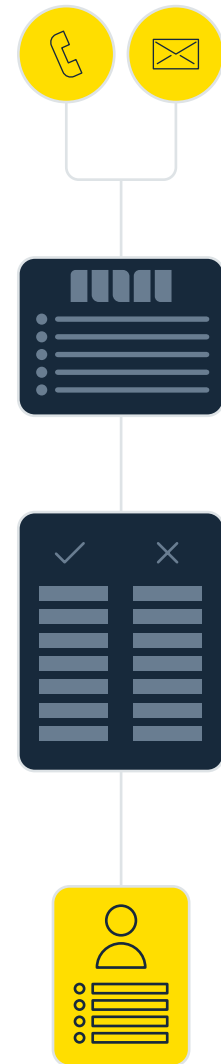
And then, of course, they need the premises, because that's the most important part of any personalized pitch. So I have the reps find four or five premises for each of their leads before they get started. It takes five to ten minutes using a combination of LinkedIn and Google searches.

I don't tell the reps what to say. I just give them an idea, a format to follow, and let them work their magic from there. It is important, though, to find intuitive reps who can connect with the prospect quickly. Because that's what personalized outreach is all about.

This whole process isn't quite as quick as the ten eighty ten model. It's much more effective, though. You've got to remember that sales is not just about how many pitches you can make, it's about what percentage of outreaches result in something positive. So this may take three to four times as long, but it's maybe 10 times as effective.

Because the bottom line is that people will like you a lot better if you show you care. It will make them a lot more likely to be receptive to your message, and it may even make them want to work with you. And it doesn't matter what your guiding motive is, as long as the interest is there.

Outreach is all about personalization. That's it.





## IN PLAYBOOKS™

With a tool like Playbooks™ you can even require a specific amount of personalization fields be filled out before they will be enrolled into a Play (cadence). This will require your team (Marketing and SD) to find and fill out these personalization fields before they will be able to load them and work them. You can set the bar low enough, that Marketing should be able to push all the information over, or high enough that the BD has to do some reserach before reaching out. Once the number has been meet, they will automatically be enrolled into your Play to be worked.

The screenshot displays a CRM interface with a contact detail view for Matt Langie. The 'Personalization' section is expanded, showing a 'Personalized Score' field with the value 0. An overlay window titled 'People' is shown on the right, displaying a list of contacts sorted by 'Personalized Score' and a message: 'It's lonely in here, add people to Playbooks'.

Contact Detail	
Contact Owner	Becc Holland [Change]
Name	Matt Langie
Account Name	XANT
Title	CMO
Phone	(555) 555-5555
Mobile	
Email	mlangie@XANT.ai
Reports To	[View Org Chart]

**Personalization**

Personalized Score	0
--------------------	---

Company: Company M&A Details  
Company: LinkedIn Post Premise  
Company: LinkedIn Post

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- ✓ LocalPresence
- ✓ Email tracking
- ✓ Sales Navigator Integration
- ✓ Email guesser
- ✓ Best contact method
- ✓ CRM Sync
- ✓ Activity Dashboard



Learn how to **Flip The Script** from Becc Holland in her online course on YouTube.

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CHIRUS

XANT