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Personal vs. Robotic: How to turn automated email into personal experiences that drive new and repeat sales

Jermaine Griggs
Founder, Hear & Play Music

Who I am (the quick version)

- Grew up in Long Beach, CA

- Started Hearandplay.com in 2000 with $70

- By 19, we grew to mid-six figure business

- By 21, surpassed seven figures

- Today, our total sales exceed eight figures

- Having bootstrapped, I attribute much of success to automated and personal email marketing (relationship with customers)

"Automated" and "personal" in the same sentence...

An oxymoron?
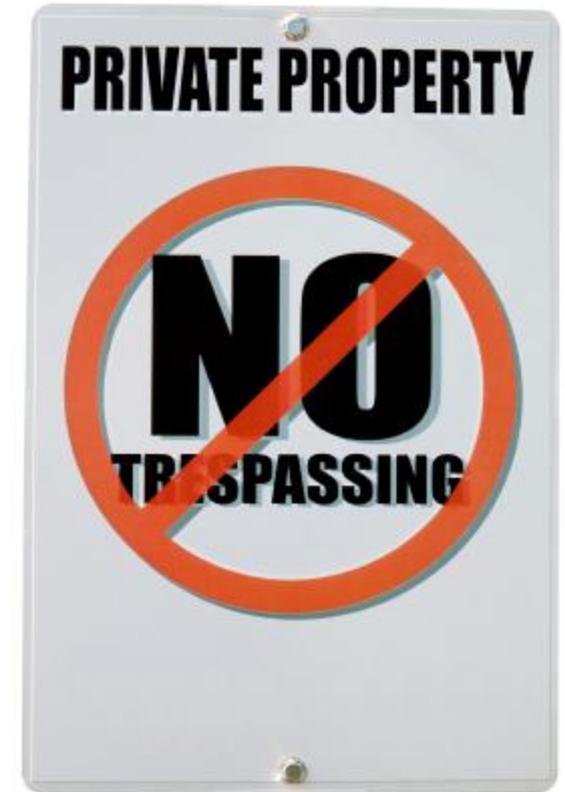
In this presentation …

- Why the words **"Automated"** and **"Personalized"** are <u>not</u> contradictory, and…

- How to achieve both by utilizing **demographic** and **psychographic** data collected to customize user experience (message → market match), which…

- **Improve conversions,** lowers opt-outs, and increases customer retention / ltv.

Case Study: ME

- Focusing on automated, personalized email marketing increased my **lifetime customer value** by 416% in 14 months (from $90 to $375+)

- Avg global clickthrough rate of 41.28%
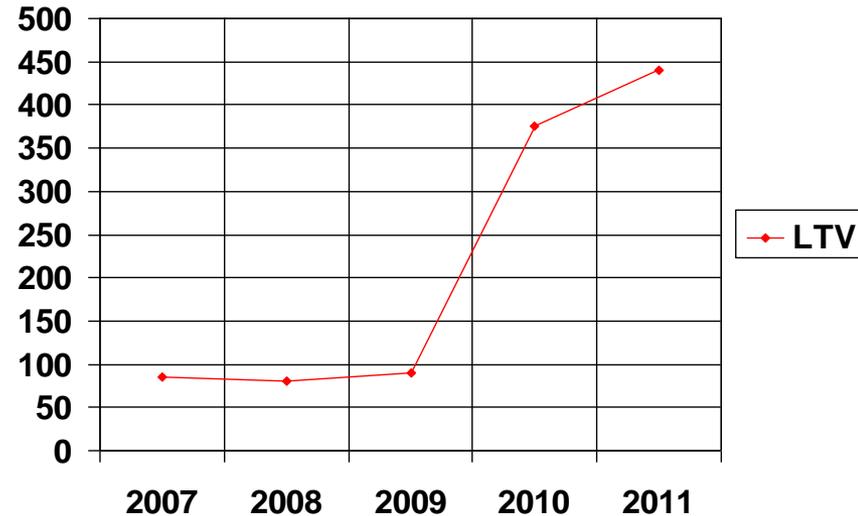
Global Clickthrough Rate 41.28%

Today:

Customer Total Purchases Average	$439.53

Before	After
• We asked for skill level and favorite style on opt-in form	• Ask the same questions but actually started **USING THE DATA**
• Same follow up to all users with "personalized" fields (i.e. – "learning [jazz] piano")	• Users are segmented and receive *authentic* emails based on style, skill level, and behavior (clicks/purchases/time on page)
• There was a *set-in-stone* schedule of follow up emails	• Everything is conditional and based on user behavior. One email may trigger another, and another.

Before	After
• Used a *"one-to-many"* broadcast tone because we had no choice	• Use conversational tone and reference past actions taken (e.g. - "Bob, I noticed you checked out my last gospel lesson on traditional hymns")
• Once in our system, no additional data was used to alter future communications (static follow-up)	• Every action taken results in a tag added to their profile, which can be used as a condition in future automated emails (dynamic)
• Once the sequence was over, it was over	• Like quantum physics, *packets of possibilities* exist based on accumulated profile data (promotions can be repeated for those who didn't click or buy, new promotions started, etc.)

Before	After
• Had no way to gauge how responsive a prospect was	• Using *lead scoring* and attaching points to each action (click, view, time on page, purchase), distinguishes **hot** from **cold** leads/customers.
• Offers were sent at arbitrary intervals (based on generic research but not tailored to prospect's receptivity)	• Offers are sent when prospects pass certain thresholds (lead score, "x of last y" messages clicked, avg. buying cycle period exceeded, etc.)
• Prospects had no control over what messages they received	• With the *insertion* of a simple trackable link, prospects can be asked to click if they have interest in receiving further details on the subject matter *(or even yes vs. no links)*

An automated sequence with 171 steps

146	What key am I in e-mail 1	Actions Active	Delay 210 Days	Actions Yes	View actions
147	Advice to student about learning songs e-mail	Actions Active	Delay 220 Days	Actions Yes	View actions
148	How to improve timing and rhyhtm e-mail	Actions Active	Delay 230 Days	Actions Yes	View actions
149	[SOFT SALES - HANON] Timing and Rhythm Advice Follow up (for those who clicked last e-mail and dont have hanon course)	Actions Active	Delay 233 Days	Actions Yes	View actions
150	Transposition vs Modulation e-mail	Actions Active	Delay 240 Days	Actions Yes	View actions
151	This student gets it - importance of number system e-mail	Actions Active	Delay 250 Days	Actions Yes	View actions
152	How to play altered (#9#5) chords (for intermediate/advanced players)	Actions Active	Delay 255 Days	Actions Yes	View actions
153	How to play altered passing chords (for those who clicked yesterday's lesson on altered chords)	Actions Active	Delay 256 Days	Actions Yes	View actions
154	Polychord game e-mail	Actions Active	Delay 260 Days	Actions Yes	View actions
155	How I quickly learn in all 12 keys e-mail	Actions Active	Delay 270 Days	Actions Yes	View actions
156	My favorite chord inversion e-mail	Actions Active	Delay 280 Days	Actions Yes	View actions
157	Ways to enhance your chords and playing	Actions Active	Delay 290 Days	Actions Yes	View actions
158	Ways to enhance your chords and playing part 2	Actions Active	Delay 293 Days	Actions Yes	View actions
159	Football, stiches, and the lessons learned	Actions Active	Delay 300 Days	Actions Yes	View actions
160	How to open up your chords	Actions Active	Delay 310 Days	Actions Yes	View actions
161	Excuse Killer E-mail	Actions Active	Delay 320 Days	Actions Yes	View actions
162	How to find the chord progressions in song FAQ e-mail	Actions Active	Delay 330 Days	Actions Yes	View actions
163	Repetition is the mother of skill e-mail	Actions Active	Delay 340 Days	Actions Yes	View actions
164	5 Getting started tips (for beginners only)	Actions Active	Delay 350 Days	Actions Yes	View actions
165	Tips for experienced players e-mail (only for intermediate, advanced, teacher)	Actions Active	Delay 350 Days	Actions Yes	View actions
166	4 Tips for getting to next level	Actions Active	Delay 360 Days	Actions Yes	View actions
167	Free 7 day trial version of PITCH - follow up to 4 tips e-mail (for those who clicked)	Actions Active	Delay 362 Days	Actions Yes	View actions
168	[SOFT SALES] Follow up to PITCH download and 300pg course offer (to clickers that don't have 300pg)	Actions Active	Delay 365 Days	Actions Yes	View actions
169	http post statistic - Over 1 year in sequence	Actions Active	Delay 365 Days	Actions Yes	View actions
170	Merry Christmas from Sinbad and Jermaine	Actions Active	Christmas (ignore year)	Actions Yes	View actions
171	23-minute ChristmasKeys Interview	Actions Active	Thanksgiving (ignore year) (1 days after event)	Actions Yes	View actions

171 steps? Are you crazy?

- No
- Segmentation: Not all prospects will receive all 171 steps in 365 days. The steps act as "possibilities."

- Some steps are **genre-specific**
- Some steps are **behavior-specific**
- Some steps are **holiday/anniversary-driven**
- Some steps are **cyclical**
- Some steps utilize **multimedia**

Example: Beginner gospel musician

- Opt-in with first name, email, beginner (skill), gospel (style)

- Receive gospel-related communications (with colloquial language to build rapport)

- Every email clicked, video watched, and minutes stayed on page result in points added to their *lead score* (which affects frequency)

- As they watch lesson samples sent via email, two-question surveys collect further data that be used in future.

Example: Beginner gospel musician

- *Time on page* and *video usage* stats as conditions in future communications to ask user how they enjoyed the lesson and even offer a follow up lesson.

- If desired action wasn't taken, benefits of CTA can be re-emphasized

- Weeks later, follow-up steps can reference past similar actions taken to further current desired actions (e.g. – "This video is similar to the one you watched a few weeks ago.")

Example: Beginner gospel musician

- Evergreen newsletters / emails can be used and recycled at later times based on usage data.

- Anniversaries are acknowledged (e.g. – "It's been six months since you first committed to learn gospel music on the piano").

- Soft offers are generally presented under content or as an *aside* early on ("P.S.").

- Hard offers are presented once user has passed lead score thresholds, has clicked certain # of links, has requested front end offer, has raised their hand by clicking previous links, and a number of combinations thereof.

Taking it a Step Further: Adding human touch

- Incorporating multimedia channels.

- Adding personalized (and even generic) audio messages to various email follow-up.

- Voice broadcasting to emphasize a particular email sent or campaign started.

- Sending birthday cards.

- Offline personalized postcards.

Taking it a Step Further: Adding human touch

- SMS "Tip of the Week" – *Mobile Music Minutes*

- Starbucks gift cards and cookies (customers who pass various monetary thresholds)

- Incorporating direct mail (catalogs, direct mail offers sent once various email thresholds have been met)

Upselling and cross-selling

- All upselling and cross-selling is based on data in their profile

- During and after purchase, user is shown offer based on hierarchy: what they just bought, what they've already bought, and what they've proven to be interested in (based on tags/data in record), and current customer value.

- Global Upsale Rate: 33.8%

- Follow-up backend selling utilizes RFM analysis: Recency, Frequency, Monetary.

- Average customer now comes back 9.14 times

Avg Transactions	9.14

Wrapping it Up: Action steps

- **Collect key pieces of data** to get the conversation started

- **Use CRM** that will allow you to continually add and act upon data and tags in user records

- **Build out different paths within the sequence for your most active users to follow** (course correction for others)

Wrapping it Up: Action steps

- **Every link or action taken should be tracked with CRM system.** Use data to keep conversational tone.

- **Implement an internal "scoring" system** that distinguishes your hottest prospects and customers from the rest.

- **Don't be afraid to have five "almost" duplicate steps** that cater to the exact needs of different segments vs. one-size-fits-all.

Wrapping it Up: Action steps

- **Incorporate other marketing channels and multimedia elements:** direct mail campaigns, personalized audio, video, post cards, birthday cards, gift cards... especially to hyper-responders.

- **Use behavior data to cross-sell based** on last purchases, last pages visited, time on page ranking, lead score, etc.

- **Remember: Don't be afraid to use a personal, conversational tone...** even in B2B. *"Companies are People."*

Thank You ☺

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