# Grow customer relationships through personalized marketing.

A guide to communicating from the heart, and truly connecting with your customers.

IN THESE
**4**
STEPS

:copper

# What's in the guide:

# Communicate with heart to drive business growth

We know what you're thinking: "Communicating with heart won't work for my business." Sure, maybe it wouldn't have worked 2 years ago, but things are different in 2021.

# A fundamental shift is happening right now, and empathy is at the center of it.

Business success is being totally redefined.

Here's the thing: For years, marketing and sales have been super transaction-focused.

HOW CAN WE OPTIMIZE CONVERSIONS?

HOW CAN WE GET MORE CUSTOMERS?

HOW CAN WE GET MORE PEOPLE TO BUY?

Companies were so laser-focused on acquisition and filling the top of the funnel, they forgot about nurturing their existing customer relationships.

But these transactional tactics are outdated. Today, the focus is less on scale-at-all-costs and more on building and servicing long-term, authentic relationships with your customers.
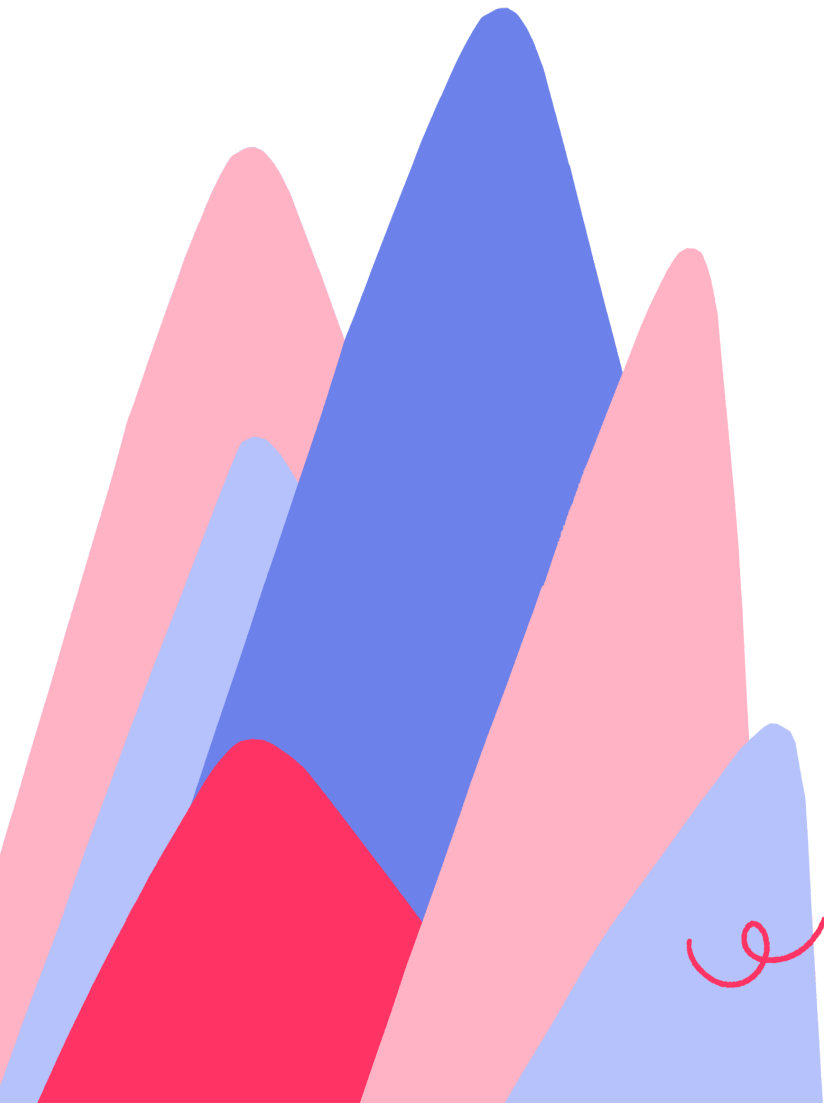
Focusing on relationship-building has some serious advantages. **Just a 2% increase in customer retention yields the same profitability effect as cutting costs by 10%!**[1]

But in our ever-accelerating tech-driven world, how do you cultivate lasting customer relationships?

The surprising answer isn't another growth hack, or ABM solution, or webinar. It's simple - but we've forgotten about it. You have to put your heart into it.

So much so, that we've discovered the secrets to building unwavering customer relationships hidden in the pages of conventional relationship advice books, social psychology theories and the wisdom of marriage counselors.

Stick with us, and you'll leave this book knowing exactly how to connect with your customers – and you might even improve your personal relationships, too.

# Companies that have an emotional connection with customers outperform their competitors' sales growth by

# 85%[2]
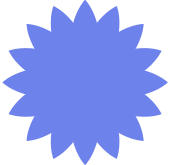
Appreciation, communication and empathy are essential for strong customer relationships. And it all starts with being a real human being.

We lovingly crafted this roadmap of 4 steps with 8 total tips to show you exactly how to put the person back in personalization and the heart back into your customer relationships.
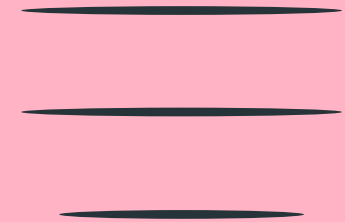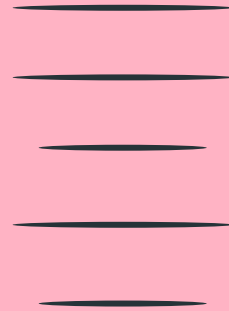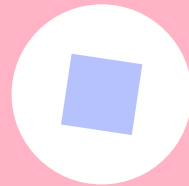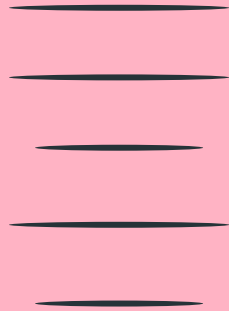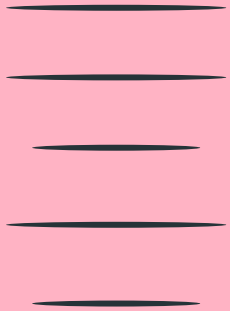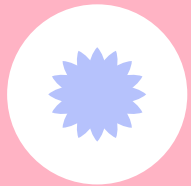
🌸 The average cold email response rate is 1%, which means for every 100 people you email, you're getting through to one person.[3]

(And probably bothering the other 99).

Our tolerance for automated or impersonal virtual interactions has plummeted as things have gone increasingly digital – and our need for human connectedness has soared.

Everyone is trying personalization through guesswork derived from automation. That's not the right way to approach it. **True personalization requires knowing who your customers are, what they want, and how to talk to them.**
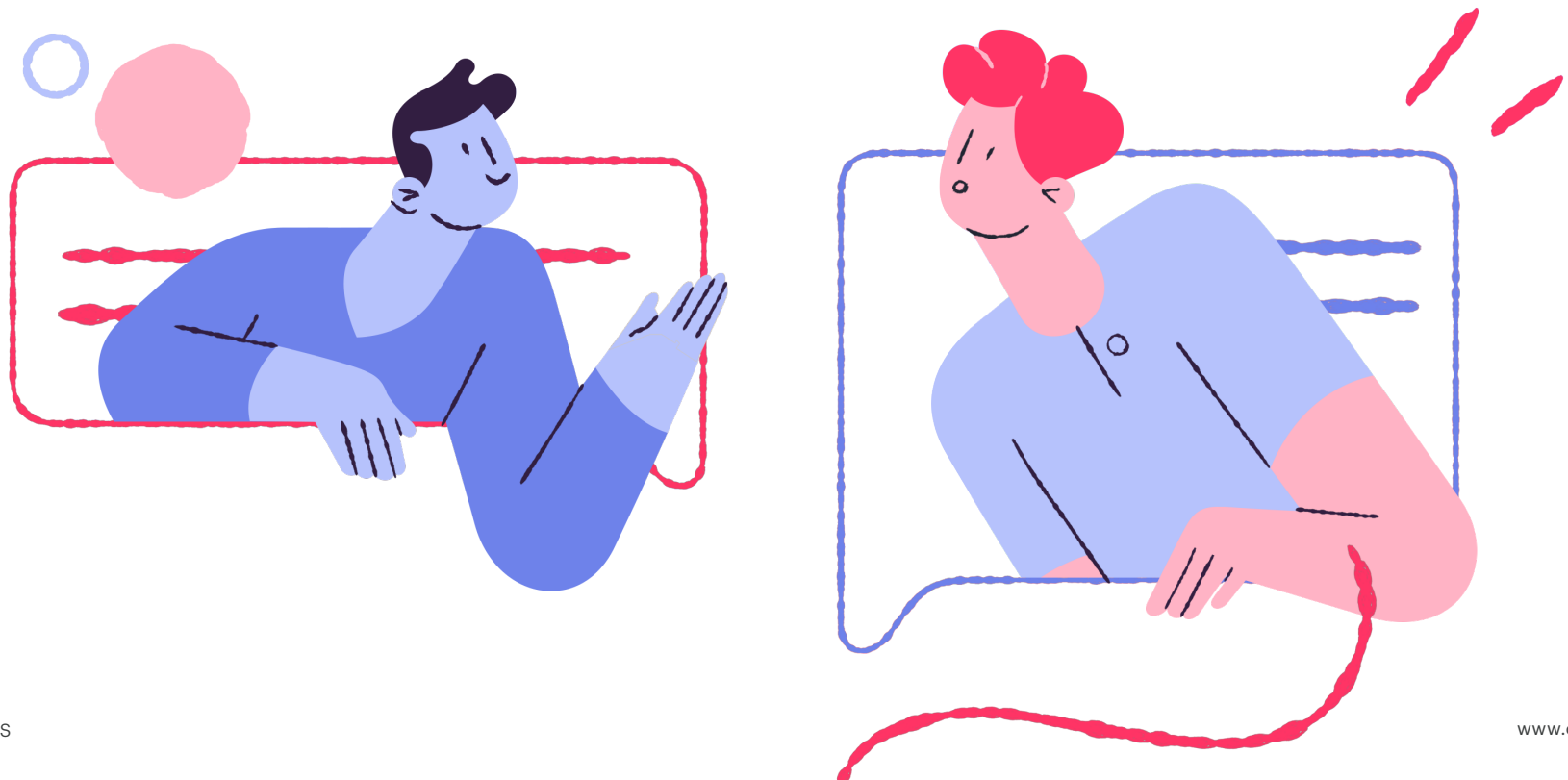
# Categorize contacts by relationship type

You wouldn't talk to your spouse the same way you talk to your mom. So why would you speak to your potential customers the same way you speak to your current customers? Categorize all your contacts to help humanize the person on the other side:

### Custom Tags

Add custom tags to further define the relationship (a SaaS company might add tags to indicate their customers' comfort level with tech: beginner, intermediate, and expert. This way, they don't offend a software engineer or fail to communicate value to a CEO)

### Detailed Notes

Always keep detailed notes on every contact and document your communication with them, to give you a holistic view of that individual

The more granular you can get with types, categories, tags, and notes, the easier it will be to effectively communicate with the person — on their level.

# Try plain-text emails
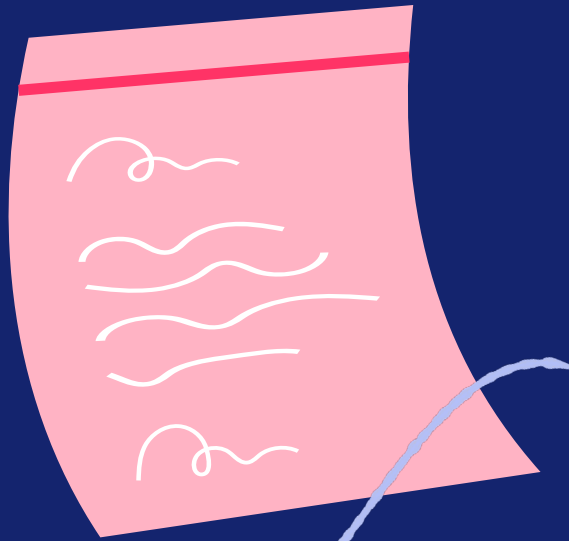
We all get the fancy marketing emails in our inbox that use an HTML design with pretty pictures and polished formatting. HTML emails are great for sending coupons or huge promotional blasts, but they're really impersonal. The minute we open them, we know it's not a message that was written just for us.

When you're doing 1:1 customer emails and nurturing customer relationships, use plain-text emails instead. Plain text just feels more personal – it's how we send emails to friends and family, after all.

Even if you're sending a touchpoint email to multiple people, try plain text. Just be sure to use merge tags and personalization details to include things like their name, the last time you spoke, or other pertinent information. It's totally possible to satisfy the need for personalization without completely slowing you down by using plain-text emails and automation together.

# Value over volume; turn down the noise.

We're now so inundated with digital noise that it feels like there's a loudspeaker blasting nonsensical chatter right into our brains (literally).

That feeling translated into numbers looks like: 306.4 billion emails were sent and received every day in 2020. The bulk is expected to grow to 361.6 billion by 2024.[4] Plus, we see an estimated 6,000-10,000 ads every single day.[5]

That's a lot of noise. And yet, sales conversations dropped by 37% in 2020.[6] So, clearly, something isn't working.

There's a psychological explanation for why this old way of marketing has worked for so long:

**The Proximity Effect**

Physical and psychological closeness tends to increase how much we like another person [7]

**The Mere Exposure Effect**

We prefer people or things simply because we're familiar with them [8]

Translation: Your customers need to see and hear from you to like and prefer you. But getting lost in the noise isn't going to help you get noticed. Tips 3-4 will help you cut through the cacophony.
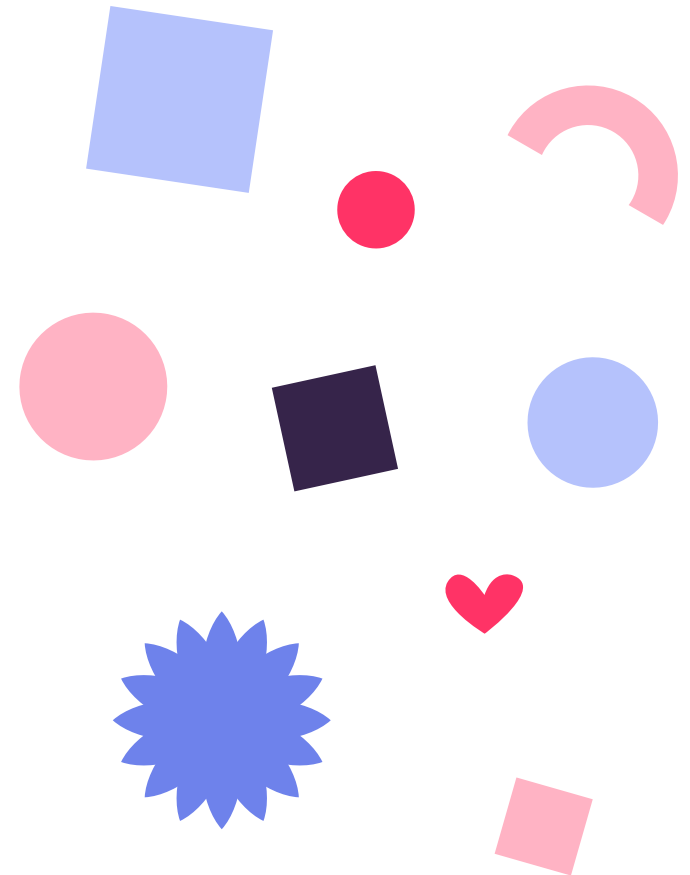
# Study the gods of inbound (and forget about buying leads).
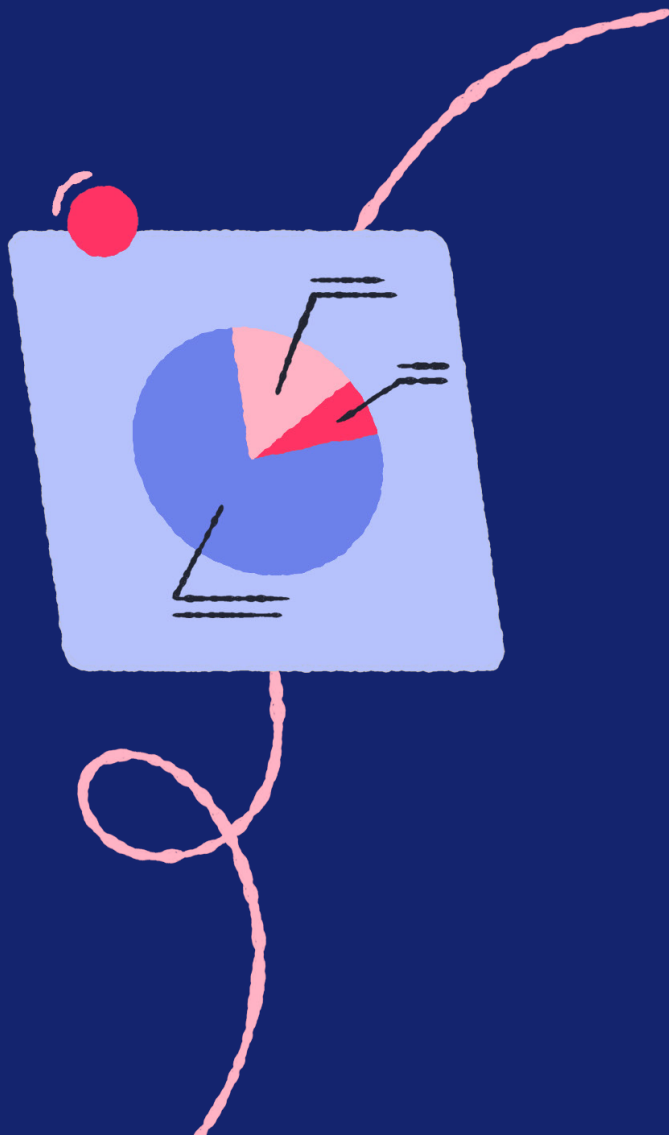
Outbound marketing alone doesn't cut it anymore. Why? Because bought leads are the coldest of the cold, and it's super hard to win new customers this way.

When you purchase leads, you're usually buying the information of people who unknowingly submitted their data to a lead generator. They don't know you, they may not want to hear from you, and they probably don't care.

You can't build a meaningful connection with these people.

The other option is buying targeted data, which is raw public data, filtered by certain demographic or lifestyle filters. In many cases, buying this type of data isn't even legal.
Even if it is, these people haven't expressed interest in what you're offering, but they fit the demographics of someone who might. These leads are ice cold and are very tough to engage.

Why? Because **relationships can't be bought, they're built.**

Instead, channel your resources into creating more, robust inbound marketing funnels and generating your own leads for a warmer, more effective lead nurturing process. Since inbound marketing strategies often include some combination of social media, pay-per-click, SEO and more, this will help you use the proximity and mere exposure effects to your advantage.

And by generating your own leads, you're also ensuring that every relationship starts out on the right foot. You're laying the groundwork to expose people to your brand before you ever reach out – maximizing your chances for success. While you might not be able to completely nix your outbound efforts, refocusing on inbound will only help you in the long run.
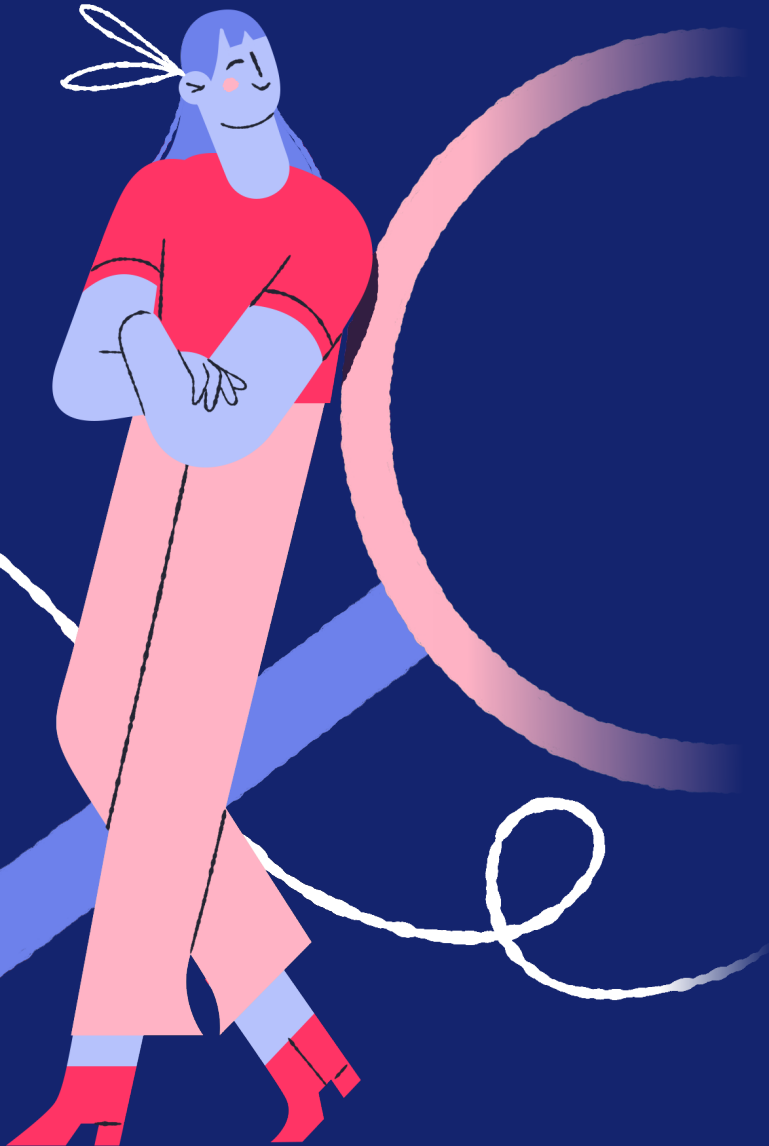
# Use email blasts sparingly.

Email blasts have a purpose. They're great for announcing company news and product updates. Email blasts should not be how you regularly communicate with your customers, though.

**Customer communications should be appropriately timed.**

Say a customer just upgraded their plan. You don't want to send them a general marketing email blast the next day asking them to upgrade their plan. That would make them feel pretty invisible and unimportant.

Don't fatigue people with a constant barrage of announcements. Try to limit email blasts to two per month. And when you do use them, incorporate some segmentation so that the emails are still targeted by contact type, category, or tag.

# Understand the need to be understood.

# Is this thing on?

Sometimes as a customer it feels like we're speaking into a void. No one likes that, and psychology backs this up:

### Self-Verification Theory

We want other people to understand us based on our firmly held beliefs and feelings.[9] Basically, we sincerely want to be understood and seen for who we are as people.

### The Belongingness Concept

We have a strong inherent desire to belong and be an important part of a group. We need strong, stable relationships with other people to thrive.[10]

We're all just human beings looking for our place in the world.

Well-timed, personalized interactions from businesses can help fulfill these basic human relationship needs. **Insights help you understand *who* your customers are and *how* and *when* to speak to them.**

# Use insights and lead scoring

We aren't always the best at gauging someone's intent.

How often have you felt like you had a great sales call with someone, and they don't buy? Meanwhile, someone we talked to for only a second, but who's primed to purchase, falls through the cracks because we didn't follow up appropriately.

Lead scoring helps differentiate people based on insights and an algorithm versus our own flawed human judgment. It can help us more accurately see people for where they are, right now.
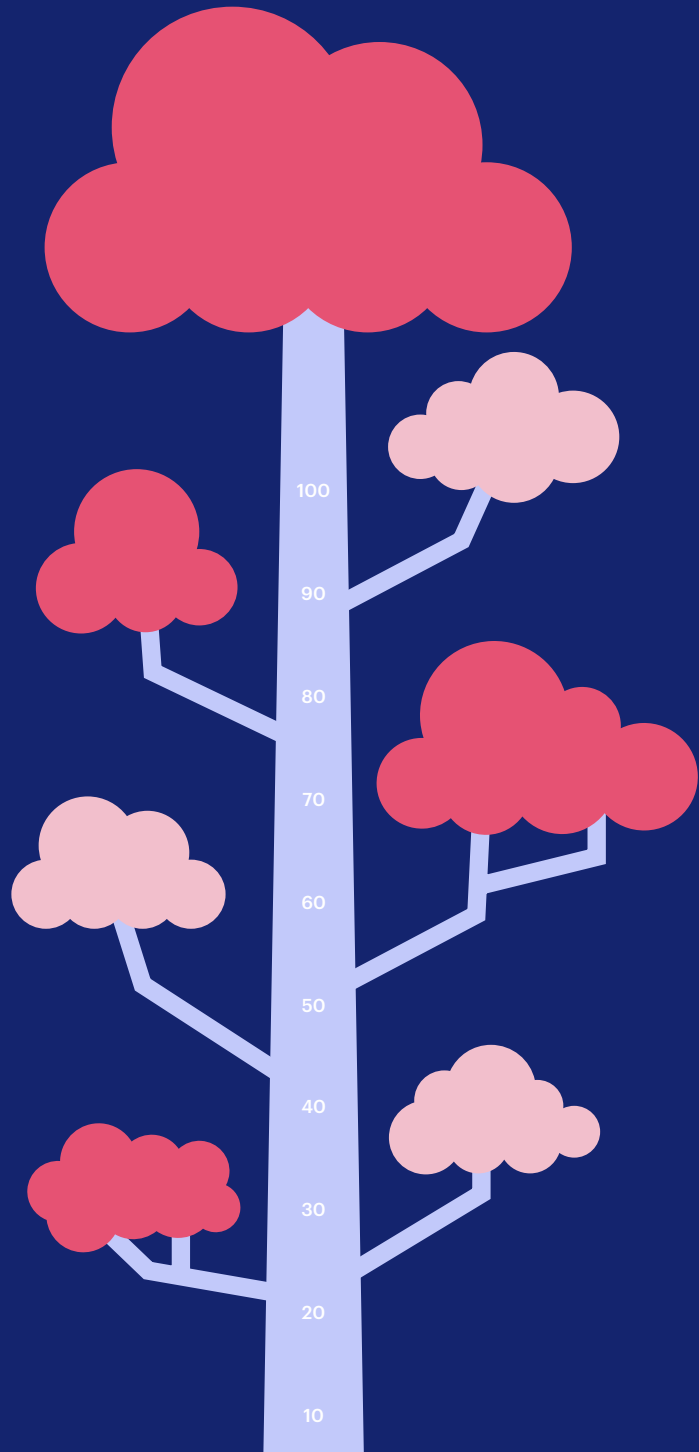
In Copper, leads are scored on a scale of 0-100—the higher the score, the hotter the prospect. Generally, points are based on factors like the number of visits to your website, how long a person has interacted with your brand online, if they follow you on social media, if they've downloaded any of your online content, and more.

Lead scoring also helps us understand and communicate more effectively with people. It's like having a code for getting to the heart of customer communications:

**Contact with a lead score of 20**

Needs more trust-building, get-to-know-you conversations and exposure before they're ready to buy

**Contact with a score of 90**

Just needs you to answer their last few objections

100

90

80

70

60

50

40

30

20

10

**TIP**

# Sync email and web engagement
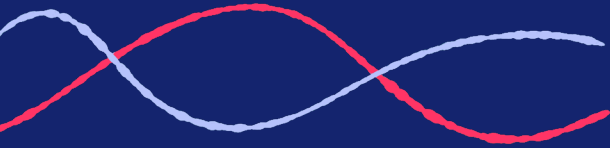
When someone engages with your website – actually engages by navigating through different pages, clicking on a call-to-action button, or signing up for a newsletter – they're at least somewhat interested in what you have to offer. Tracking your contacts' activity on your website can offer useful insights.

Say someone spends a lot of time on your FAQ page; they're probably interested, but they also have some questions. This is a perfect time to contact them.

This is easy to do by syncing your emails to correspond with your contacts' website activity:

1. Track your customers' website activity (once they've opted in, of course!)

2. Set up an email to automatically send based on that activity

Using our new **Email Sequences feature**, you can easily trigger emails to send when your contacts engage with your site. Your customers' web activity will automatically propagate in their lead cards and increase their lead score. This way, you can catch them when your company is top of mind and engage in a highly personal way.
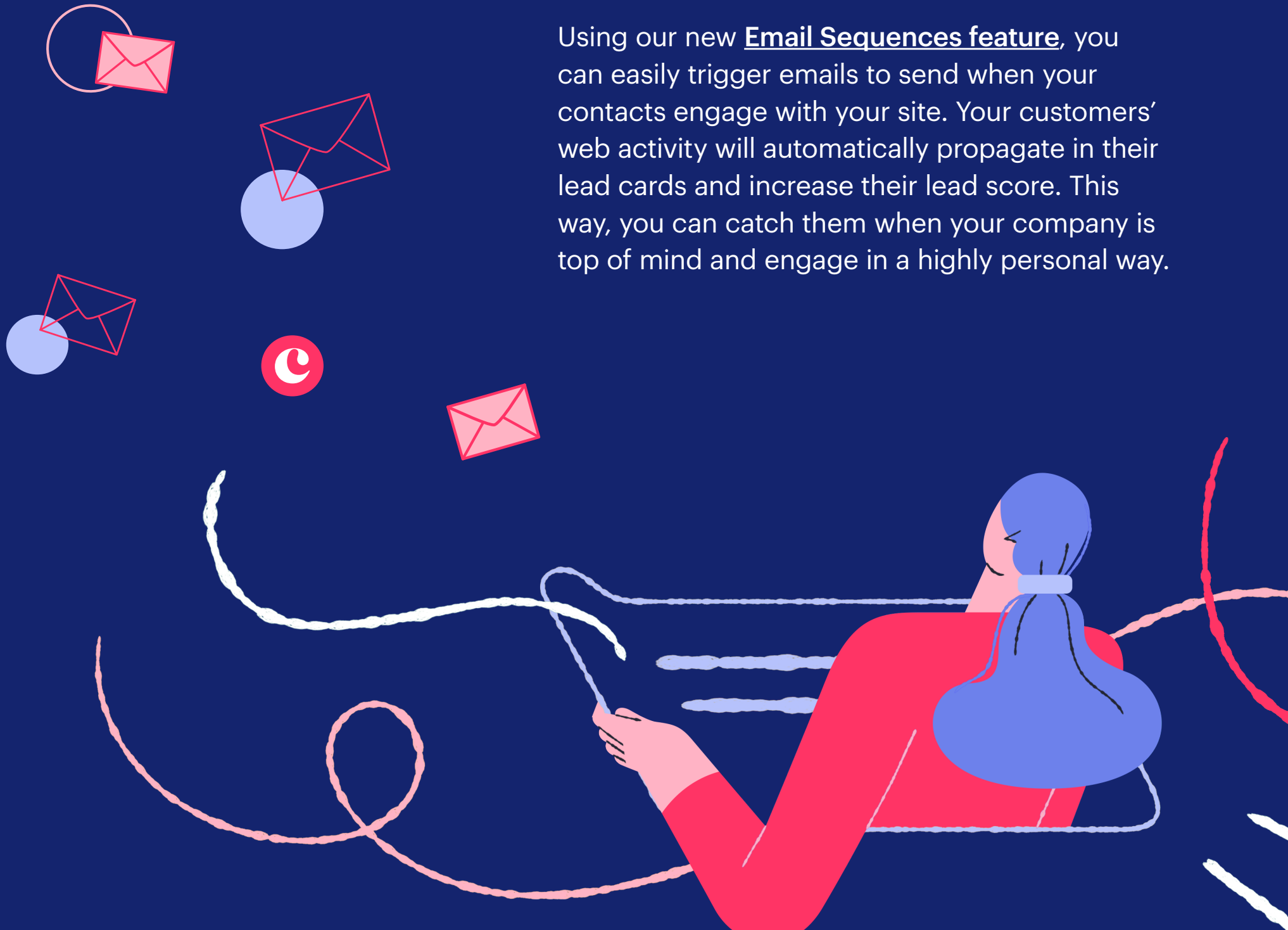
# Speak from the heart.

Returning to Psych 101, the Social Exchange Theory says that if the costs of continuing a relationship outweigh the rewards, it isn't worth sticking around.[11] We basically all have these ongoing cost-benefit analyses running through our heads for every single relationship.

**Love languages...** yes, we're going there!
Gary Chapman's book *The 5 Love Languages:*
*The Secret to Love that Lasts* shows five general
ways partners express and receive love:

PHYSICAL TOUCH

QUALITY TIME

WORDS OF AFFIRMATION

GIFT-GIVING

ACTS OF SERVICE
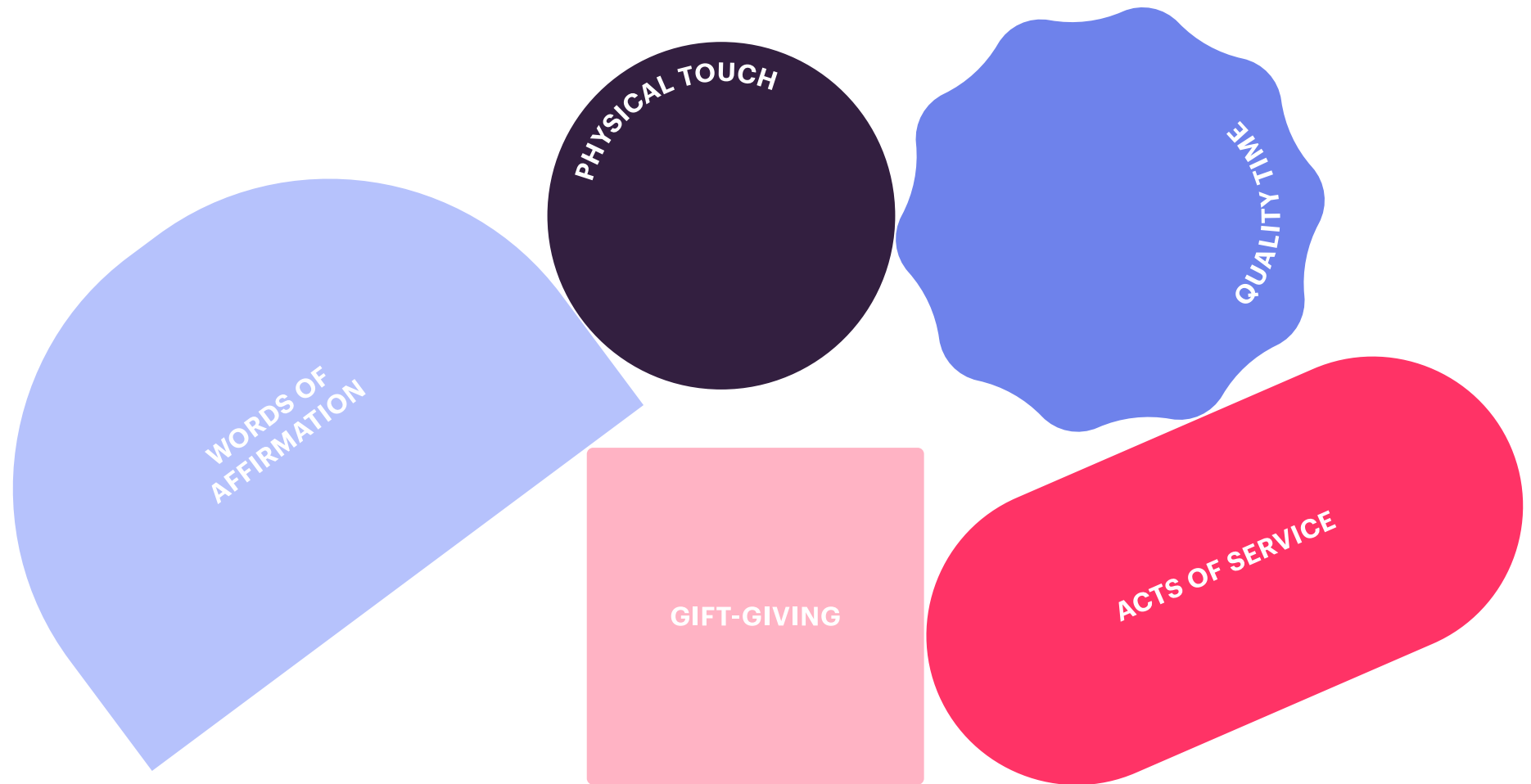
The theory applies to business relationships, too. If you stop providing value to your customers, they aren't going to hang around.

Providing consistent value can be complicated because relationships are complicated, but it comes down to the things that individual people need to feel appreciated and loved.

Figure out your customers' love languages through surveys and respond appropriately. Customers who speak in gifts will need regular promotions, free consultations, eBooks, downloadable cheat sheets, discounts and other free extras to feel like you care. Quality time customers will need phone calls and time investments to show them you care.

Really taking time to understand and speak your customers' love languages will go a long way towards unlocking a deeper level of personalization.

But personalization can't do all the heavy lifting for nurturing customer relationships. Communication is another essential ingredient.

# Use warm language in all your communications.

Sometimes, we get so caught up in talking business that we come off as cold and impersonal. Instead, we should lean into warm language in all our customer communications.

Here are some quick tips:

- ✓ Use contractions
- ✓ Get rid of jargon
- ✓ Go for a Flesch Kincaid Reading Ease Score of 60-70
- ✓ Use casual language over formal language
- ✓ Be sure to express gratitude
- ✓ Use active voice
- ✓ Get rid of spammy subject lines
- ✓ Add personal tidbits about the customer to the email body
- ✓ Always end your emails with questions

For more detailed guidance on this topic, **check out our blog post**.

# Communicate between transactions.

Companies tend to be better at transactional emails than personal communication in between purchases. This doesn't sit well with customers: 84% say being treated like a person, not a number, is critical to winning their business.[12]

Take time to communicate with your customers and prospects between transactions.

To put this tip into action:

✓ Set up reminders in your CRM for regular follow-up

✓ Automate email sequences between your transactional emails to nurture the relationship

✓ Reach out occasionally just to check-in

✓ If appropriate, set aside time to talk to the customer on the phone or in-person occasionally

# Put your heart into it.

Your customers are people with full lives. They want what we all want: to love, to be loved, and to belong.

So, it's time we kick the transactional mindset to the curb and shift to a mentality of empathy. If we want to cultivate lasting customer relationships, we need to abandon the cold, numbers-based approach of the past.

Put the person back in personalization and truly understand who your customers are, then provide real value by communicating from the heart.

## See for yourself! Try Copper and Email Sequences free for 14 days

**Start a trial**

Here at Copper, customer relationships are our specialty. We are the Google-recommended CRM for businesses that grow through strong relationships.

Our new Email Sequences feature gives you the power to enhance your customer relationships with less work. It enables you to fill in the gaps between email blasts and transaction-based communications with powerful segmentation and automation.

Here's to building more meaningful relationships with your customers – without tons of extra work on your part.

:copper

# Sources

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