



Advanced Warm Email Prospecting Strategies and Techniques

Summary Handout

Introduction

I began using email in a very strategic way back in 2000. I was in corporate sales at the time, and I was tasked with generating my own leads. I eventually added other direct response strategies to my toolbox. But email was always one of my go-to approaches.

I've since refined this approach multiple times for solo professionals. And I've taught it to thousands of freelancers in dozens of creative and professional industries.

How to Approach This Execution Plan

If you're not entirely familiar with my warm email prospecting strategy, you'll want to start with lessons 1–4. In those lessons, we cover the basics—from what warm email prospecting is to the elements that make it so powerful.

If you're already comfortable with warm email prospecting, you may want to skip ahead to lessons 5–12. In those lessons we dig into implementation. We talk about how to get started with warm email prospecting, how to make it a habit and how to avoid some of the most common mistakes.

We also get into some very specific sequences you can follow, depending on your goals and the quality of the prospect you're going after.

What Is Warm Email Prospecting?

Let's first talk about what warm email prospecting is *not*.

It's *not* mass emailing. It's *not* about sending newsletters or automating your prospecting. It's not copy-paste or cookie-cutter scripts.

It's the opposite of all that.

Think of warm email prospecting as "artisan prospecting," where each email is personally handcrafted and written *for one person only*.

When done right, a warm email positions you as a knowledgeable professional with a relevant and timely message.

It's one of the quickest, most cost-effective ways to attract and land high-quality clients—without the unpleasantness of cold-calling or the costs and time requirements of most traditional marketing tactics.

Why Does Warm Email Prospecting Work So Well?

Warm email prospecting (when done well) contains three key psychological triggers:

1. Personalization
2. Relevance
3. Brevity

When all three of these elements are in place, your email stands out from 99 percent of all marketing emails in your prospect's inbox. Which means you have a much higher chance of getting a response.

And once you have a response, it becomes *much* easier to engage the prospect in a dialogue about your services.

The Warm Email Template

SUBJECT LINE: [Meaningful Connection]

EMAIL BODY:

[Meaningful Connection]

[Value Statement]

[Credibility URL]

[Soft Invitation to Connect]

[Email Signature]

Meaningful Connection: A statement that ties what you do to something you noticed about that particular prospect.

Value Statement: A sentence or two that explains what you do, for whom you do it, and why you're different from many competitors.

Credibility URL: A link to your "About Me" page, some relevant samples, testimonials, a success story or anything that would help you sound credible. It can be a list of recent clients, a description of an award you've received or some big accomplishment.

Invitation to Connect: Keep it low-key. "Should we connect?" or maybe, "Would it make sense to schedule a brief call soon?"

Keep your email short and to the point: *125 words or less!*

Remember, the goal is *not* to land a client—it's to start a conversation.

Meaningful Connections

There are *four* reliable types of connections you can make in your email:

1. Point to a trigger event
2. Point to a trigger attribute
3. Point out something relevant about yourself (e.g., a relevant client or accomplishment, or relevant knowledge or experience)
4. Leverage a mutual contact

#1: Point to a Trigger Event

A trigger event is simply a big event or change within an organization (or in that organization's industry) that creates an opportunity for you as a freelancer to get your foot in the door.

Here are some examples of *great* trigger events:

- Positive or negative financial announcements
- New funding received
- New product or service announcements
- Expansion into new markets
- New initiatives within the organization
- A new marketing director or VP hired
- New activity on their website/blog (or lack of activity)
- An upcoming event the prospect is putting together or going to be attending
- Layoffs, downsizing or rightsizing
- Pending or recently enacted legislation
- Landing a very large or prestigious new client

These events are valuable because they create a certain level of “pain” or need that makes the company much more receptive to your services.

#2: Point to a Trigger Attribute

Trigger attributes are attributes about an organization that would trigger a potential need for your services. Unlike trigger events, trigger attributes are *not* event-related. Rather, they're based on something the prospect has been doing for a while (a trend) *or* is just part of who they are or what they stand for.

So rather than the message being "Hey, Mr. Prospect: I read about this particular event/development..." it's more like:

- "Hey, Mr. Prospect: I noticed that you have quite a few _____ posted on your website."
- "Hey, Mr. Prospect: I noticed that you're starting to really go after the _____ market."
- "Hey, Mr. Prospect: I noticed that you do a lot of work in this area..."
- "I know that marketing and selling _____ (type of product) often requires a lot of _____."
- "I saw the _____ you've launched. Have you considered doing _____ with that content?"

#3: Point Out Something Relevant About Yourself

This can be a very powerful meaningful connection to use. Yet it's one of the most underutilized approaches in warm email prospecting.

It's all about pointing out something about your background, experience or skill set that would be attractive to the prospect, and then briefly explaining how it could be relevant and valuable to them.

Note: It does *not* need to be about your freelance experience. It can (and often is) about something outside your freelance career.

Examples:

- I was a high school teacher for 22 years (training/education co)
- I was an analyst for Forrester Research for 7 years
- I was in hotel management for 12 years
- I've worked in and around the renewable energy industry for 8 years
- I'm a Salesforce.com certified developer, so I understand _____
- I've written for XYZ Co. and ABC, Inc.
- My family has been in the auto parts industry for over 60 years
- I'm a passionate gardener

#4: Leverage a Mutual Contact

The fourth way you can make a relevant and meaningful connection with a prospect is by leveraging a personal/professional contact you both share.

This approach can be *extremely* powerful when done right. It basically involves looking at your personal and professional network and trying to see whether there's a connection to a key contact in one of your prospect companies. One way to do this is to simply call personal and professional contacts who may know people in some of the companies you're targeting and see if they do indeed have a connection there.

But an even better and more practical way to do this is with LinkedIn.

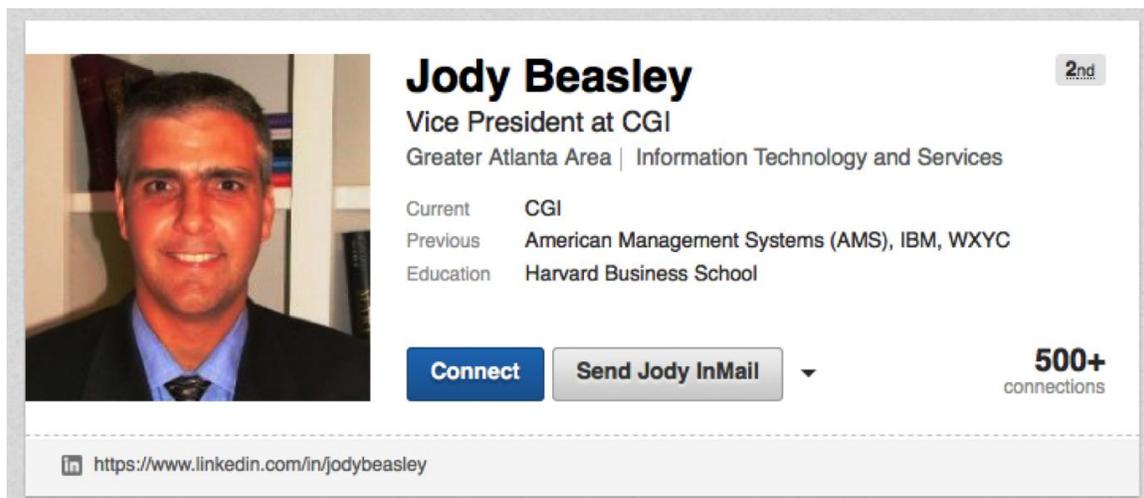
Using LinkedIn to Get an Introduction

If you already have a LinkedIn account, it's simply a matter of logging in, punching in the name of each contact you want to email and seeing if there's anyone in your immediate network with a direct connection to that individual.

If you've worked in an industry long enough, or if you have a lot of people in your network, you'll be surprised how easy it is to find direct connections to some of these individuals.

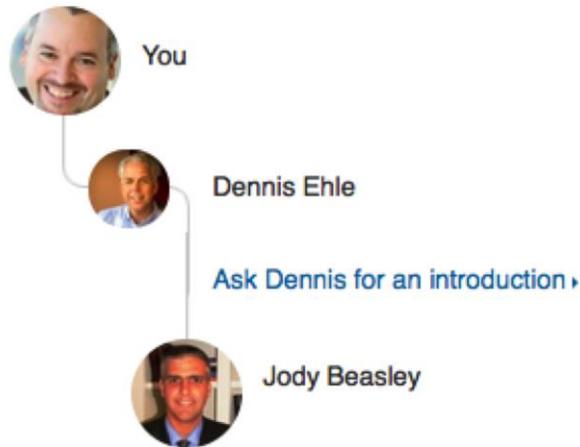
For example, let's say that I've identified Jody Beasley at a company called CGI as someone who would be a great prospect for me.

By doing a search in LinkedIn, I find he's connected to someone I know—a guy by the name of Dennis Ehle, who happens to be a past client of mine.



The image shows a screenshot of a LinkedIn profile for Jody Beasley. On the left is a headshot of a man with short grey hair, wearing a dark suit, light blue shirt, and patterned tie. To the right of the photo, the name "Jody Beasley" is displayed in large bold black text, with a "2nd" connection badge to its right. Below the name, it says "Vice President at CGI" and "Greater Atlanta Area | Information Technology and Services". A list of work history follows: "Current: CGI", "Previous: American Management Systems (AMS), IBM, WXYC", and "Education: Harvard Business School". At the bottom of the profile section, there are two buttons: a blue "Connect" button and a grey "Send Jody InMail" button with a dropdown arrow. To the right of these buttons, it says "500+ connections". At the very bottom of the screenshot, there is a URL: "https://www.linkedin.com/in/jodybeasley".

How You're Connected



So I send a warm email to my contact, Dennis, asking for an introduction.

SUBJECT LINE: *Jody Beasley at CGI*

Hi Dennis,

I'm writing because I've recently launched a commercial writing business. Specifically, I'm leveraging my corporate training experience to help companies in that industry write better marketing and sales materials.

I've been working on putting together a very targeted list of prospects—companies I really believe I can help. One of these companies is CGI. And while doing a search in LinkedIn, I saw that you were connected to Jody Beasley over there.

Wanted to see if you could introduce me to Jody so we could determine if my services would be of value to CGI.

I've found that many companies in that industry have more marketing materials to write than they have time or resources to create them. And I can help fill that need in an affordable way.

Thanks for any help you could provide.

Given my existing relationship with Dennis, chances are good he'll make the introduction. And the prospect will be much more receptive to starting a conversation with me because I came to him through a mutual contact.

For more email script examples, see the document "Sample Warm Emails" under Resources.

Value Statements

A good value statement completes your meaningful connection. It explains why this “thing” you identified is something you can help the prospect with.

A value statement captures in one or two sentences:

1. What you do
2. For whom
3. What makes you different
4. Why that difference matters

Remember: You don't need all four elements to be effective.

Keep your value statement simple and conversational. Think of it as an internal message you'll use as the basis of your copy.

Subject Lines

Subject lines are the most important part of your warm email. Create an effective subject line by:

1. Keeping it short (less than 50 characters)
2. Capitalizing the first letter of the first word only
3. Using the meaningful connection
4. Not giving it away!
5. Employing curiosity without losing the personal tone

For examples of subject lines, see “The Ultimate Subject Line Swipe File for Warm Emails” under the Academy's bonus resources.

Remember: Keep your warm emails relevant, personalized and brief.

10 Warm Email Archetypes

Familiarity with the most common warm email archetypes will help you formulate your scripts. Typically, you'll end up using two or three archetypes the most.

- **The Sherlock:** Point out something you uncovered about the prospect and match it to your services and/or differentiator.
- **The Industry Enthusiast:** Leverage either an industry specialty, topic niche, or personal or professional passion as your direct (or implied) meaningful connection.
- **The Idea Wellspring:** Offer to share a few relevant and valuable ideas with the prospect—and make that invitation via your warm email.
- **The Staffing Stopgap:** Take advantage of a potential need for outside professional help.
- **The Purpose-Driven Freelancer:** Go after opportunities that are aligned with your purpose or cause.
- **The Back Scratcher:** Show how you could create a mutually beneficial situation.
- **The Event-Goer:** Reference some type of conference, trade show or similar event.
- **The Local Player:** Leverage both your geography and your *existing relationship or connection* to the company you're going after.
- **The Referral Seeker:** Reach out to past or current clients to ask for referrals.
- **The Networker:** Leverage one or more contacts or relationships in your effort to connect with a new prospect.

For more details and tips on structuring scripts using these archetypes, check out the “Archetype Cheat Sheet” included in the Resources area of this execution plan.

How to Get Started

Start by doing an initial “brain dump” of people to approach. Think about:

1. Current and previous employers
2. Previous employers’ competitors
3. Past prospects
4. Prospects you’ve always wanted to approach
5. Analyst reviews
6. Company rankings
7. Business chronicle
8. Tapping your network.

These are the best places to start.

But once you’ve exhausted this list, you need to come up with a routine method to find new prospects. Generally, you can do this in two ways:

1. Scour publications
2. Use LinkedIn as a feeder

Scour Publications

Subscribe to business, industry and trade publications for the target markets you’re going after (get on their email lists and scour the online version of their publications; no need to subscribe to the print versions).

Once you’ve identified businesses or organizations to contact, you need to find the names of the right individuals within those organizations. Then you’ll need to find their email addresses.

There are a number of tools you can use to help with this. Start with LinkedIn to find names and titles. Then use Google wildcard searches to find email addresses. If that doesn’t work, try data.com or another email finder tool.

Don’t spend tons of time on this. In fact, don’t spend more than 20 minutes once you get used to the process.

For more help finding email addresses, see “24 Tools for Finding and Verifying Prospect Email Addresses” in the Academy’s Bonus Resources.

Using LinkedIn for Prospecting

LinkedIn is a great prospecting tool. It contains a wealth of information about prospects and gives you multiple ways to search for them. It also allows you to save your searches and have matches emailed to you every week.

Start by creating a search. Give it a name and save it. Then, periodically run the search and scan the results (or scan the results that LinkedIn emails to you).

When you find someone who looks promising, search for the prospect's company name and take a closer look. Is the company a good fit? Would you want to work with them?

If yes, return to the prospect and find the list of LinkedIn members who currently work for the same company. Decide who the best people to reach out to are (pick two). To help you decide, check their LinkedIn profile, read their endorsements and check their Twitter and Google+ handles for clues.

Once you've settled on whom to reach out to, hunt down their email addresses using Google or another tool.

Titles to look for:

- Product Marketing
- Marcom Manager
- Marketing Communications
- Technical Marketing Manager (for medical devices, healthcare)
- Director of Marketing and Business Development (in a small company)

Titles to avoid:

- Marketing Specialists—too low on totem pole
- Marketing Operations (processes, analyses)
- Digital Marketing (online banners, reporting)
- Field Marketing (in-person sales/account management)
- Marketing Automation (email management and reporting)
- Director of Marketing Analysis (reports, ROI)
- Director of Worldwide Marketing Communications (probably handles PR)

Lesson 6 details this LinkedIn strategy in great detail. You'll hear from Sandra Jean-Louis, a previous coaching student who has turned this process into an art form.

Making Warm Email Prospecting a Habit

It's hugely important to integrate your prospecting efforts into your workweek. And the best way to do that is to treat it as a project. Carve out a set number of hours a week to do it.

Start with a micro commitment to begin. Commit to just 30 minutes per week, then increase to one hour a week until it's a habit—then grow from there.

Decide *in advance* how you'll spend your time and write it down.

Choose a theme for each workday. For example, Mondays might be for research and Wednesdays might be for sending emails. Schedule this time into your planner.

And if you get overwhelmed with all the work that comes in, shift your focus from prospecting to nurturing.

Warm Email Prospecting Workflows

Generally, there are three warm email prospecting workflows you should be familiar with:

- Standard process
- Hot list process
- Low-key phone follow-up

Standard warm email campaign sequence: This is the “classic” process. Start here.

“Hot list” warm email campaign sequence: Use this process for your most promising prospects.

Low-key phone follow-up: You can bolt this process onto the first two processes when appropriate.

For more information, check out the three process maps in the Resources section. Also, take the time to watch lessons 8, 9 and 10.

The 12 Most Common Warm Email Prospecting Mistakes

Having used this technique extensively myself and taught it to hundreds of freelancers—and coached dozens of others on how to apply it—I have a pretty good idea of the most common pitfalls.

Be wary of the following:

1. Not incorporating all three psychological triggers in your email
2. Trying to tell your whole story in the email
3. Spending too much time and effort trying to find trigger events
4. Not clearly tying what you do with what you noticed about the prospect
5. Using a formal tone that's not warm and conversational
6. Not scheduling prospecting time into your schedule on a regular basis
7. Overthinking each message
8. Sticking to only one email archetype (no variety in your approach)
9. Failing to nurture longer-term prospects
10. Not having a clear and simple follow-up system in place
11. Putting all your prospecting eggs into the "warm email" basket
12. Giving up too early on warm email prospecting as a strategy