

# Teach NEW Dogs OLD Tricks!



How traditional sales techniques  
accelerate digital marketing

**Matt Bailey**

# Teach New Dogs Old Tricks

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Mastering New Marketing Technology with Old Marketing Wisdom

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# Follow-up after the Sale

## Email “Welcome” Series

One of the more interesting psychological phenomenon surrounding sales is the concept of the post-purchase regret, or “buyer’s remorse.” Buyer’s remorse is a common emotion after a significant purchase. We invest in a major product, and it costs us, either in terms of a hefty loan or a significant amount of money, and we wonder if we made the right decision.

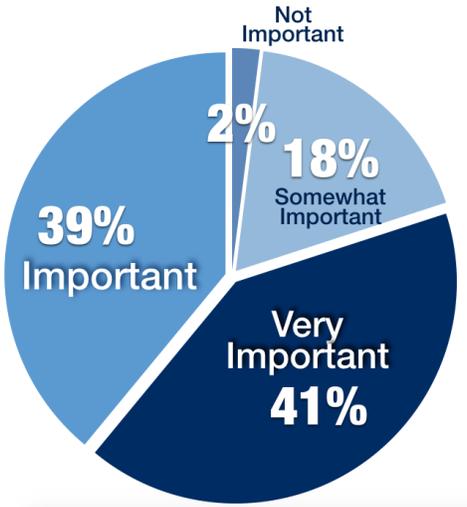
Interestingly, this sense of remorse is quickly removed when the decision to make the purchase is reinforced soon after the sale. This is why you will receive a call from a dealer about 1 to 2 days after you drive that car off their lot. They know that buyer’s remorse hits you about that time. So, their reassurance, coupled with you restating the reasons for your decision, helps to alleviate any remorse. It will never be as strong as you feel it in those first few days. Afterwards, the rationalizations have been made, and you forge ahead.

For a B2B buyer, changing from a long-time provider or taking a chance on a smaller company will inevitably produce these same feelings of remorse:

- Should I have stayed with the same company?
- The big, established company was a safe bet. Am I taking too much of a chance?
- No one ever got fired for selecting Provider A, even though they are bigger and much more expensive - will it cost me more in the long run?

Questions like these are natural, and part of the purchase process. This is also the time when a smart company acts quickly to communicate value, stability, and rewards. In a recent study, B2B buyers responded that follow-up, education, and information post-purchase is very important.

What is the importance of receiving Ongoing Content After Making a Purchase?  
(US B2B Technology Decision Makers)



Source: Ecolo Media 2015 B2B Technology Content Survey Report

A full 80% of decision makers responded that receiving follow-up was important. However, 36% of decision makers also want more than just follow-up; they want ongoing educational and thoughtful leadership content! They want to know how other industry experts are using the product, to get the most out of it.

To some salespeople, this is one of the most critical steps in the process. Even though it is post-purchase, it is the experience of the follow-up that cements the decision process of the buyer, and also develops a long-term relationship.

The decision to purchase is most likely an emotional one, yet propped up with research and facts. Therefore, the follow-up must reassure the buyer that they made a logical decision, based on their research and data. In addition, it must allow the buyer to express their reasons for the purchase. Nothing you say will be as persuasive as their own rationalization!

The result makes them feel good, as they once again “feel” the benefits of the purchase. The follow-up language must be couched in both logical and emotional terms to satisfy the basis of remorse.

These next questions are the typical types of remorse. As you can see, they are focused around both logic and emotion, but also on the perception of others. This also provides the framework for your follow-up.

- Did I spend too much?
- Did I make the right decision?
- Will my colleagues (spouse, boss) agree with my decision in the long run?

In today’s modern marketing, one of the best methods of follow-up is the Welcome Series Email. As a means of follow-up, it provides touch points at critical times throughout the follow-up process.

A Welcome Series Email kicks off after the acquisition of a new Email address. This is an automated feature of most Email Service Providers. You can pre-write a series of messages that will introduce your new subscriber to your business, product, or content. It is usually a low-profile sales tool, and focuses on bringing the new contact up to speed as to what your business is all about.

This can include links to older articles, resources, and information that they may not have seen in their discovery process. Really, when you think about it, you are serving up a PR campaign to a new user, and showcasing the best you have!

After a few Emails that help to build that relationship between you and your new contact, you can make a more practical pitch. Maybe to upsell, cross-sell, upgrade, or increase services — whichever works for your business.

**Welcome Series Email campaigns average 8x the click-through rate and 5x the revenue compared to other email campaigns.**

The point of the welcome series is that it is a programmed, automated method of introducing your business to new subscribers or customers, and helping them get to know your business better. The result is that your customers are happier by receiving helpful information, receiving support for their decision, and building their relationship with the provider. Once you build it, it can run indefinitely until you change it, but EVERY new contact receives the series, which builds additional trust and exposure.

Ultimately, the data backs up this type of relationship building. Companies that utilize welcome series Emails to communicate to new contacts show that those Emails generate 5x the revenue of other types of Email campaigns. Open Rates and click-through rates of welcome series Emails show that people are open and willing to engage with these types of Emails, because the relationship is new and they are excited to receive more information.

Don't waste this opportunity! On the following page is an example of how one company developed a series of Emails for their new customers.

**Prezi** is a cloud-based presentation software. After signing up for a monthly subscription to use an online version of the software, the subscriber receives a series of scheduled communications. The Emails present Prezi and the benefits of the purchase the same way as the sales process, yet described in educational “how-to” language.

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## Email 1: Purchase +0 days

The Prezi initial welcome Email is focused on the “how to” aspect of getting started using the software. The Email is titled: *Welcome to Prezi: A Getting Started Guide*.

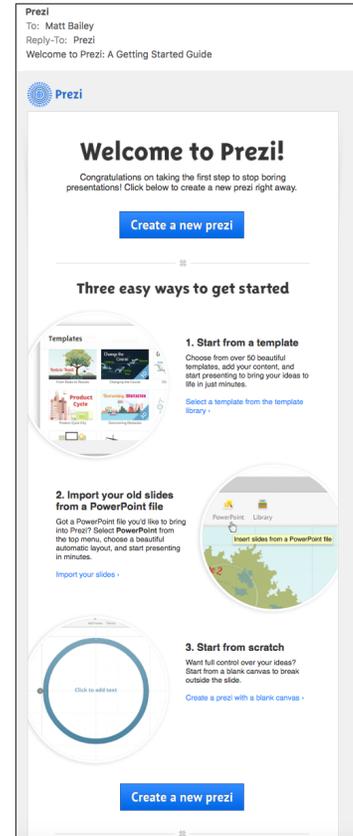
The Email outlines **three easy ways to get started**:

1. Start from a template,
2. Import an older presentation,
3. Or start from scratch.

This is simply presented, and links to the respective landing page for each start. The landing pages are not for sales, but for post-sale education!

In many purchases of software, the critical part is getting the engagement of the buyer early. If the engagement is never reached, the buyer cancels his subscription, and revenue is lost.

Similar to many other business relationships, if the buyer sees no value, there will not be an ongoing relationship. Establishing the value of the product after the purchase is just as critical as before the sale.



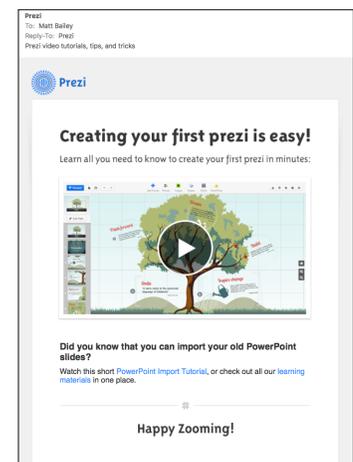
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## Email 2: Purchase +7 days

Now, I’m not sure if this was the regularly scheduled Email, or if I received this because I had not yet used the program. Either way, it was specific, and targeted to get me into the program.

The first email provided 3 ways to get started. This email was even simpler – a video. Go watch the video, and see how easy it is to get started!

Video is a powerful engagement tool, especially for post-sales of software, or any other product/service that requires the customer to use correctly for best results. Seeing HOW it is to be used can often make or break ongoing business.



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### Email 3: Purchase +14 days

This is why I love this example. The two prior Emails were focused on getting me started in the product. Now that I had begun using the product, I got an Email for a free trial of the paid desktop version.

This is an excellent use of the programmed Email, as it educates, educates again, and then asks for another commitment: an upsell, a “hook.”

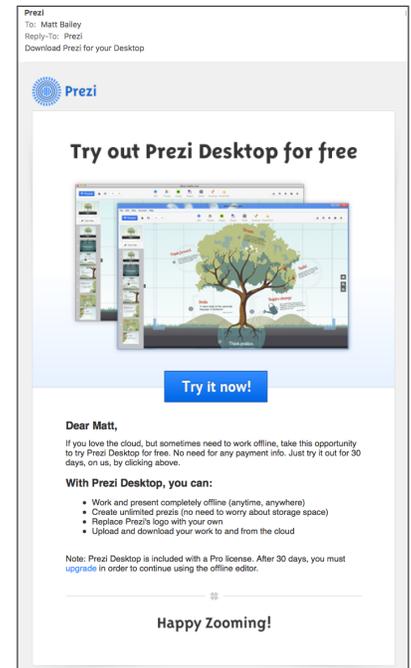
This is an excellent template to follow, as ongoing communication enables the customer to know that the company is in contact with them. They are not far away and silent, but active — informing and educating.

As a customer becomes more active and engaged, more messages can be developed, to grow and invite them to take another step in the process. It could be an upgrade, a review, or a recommendation.

If you were in touch with your customers this often, and providing value in every communication, how easy do you think it would be to ask the customer to deepen the relationship with you and your company?

When you get a new customer or a lead, this is the time when their interest is at the highest level of excitement and engagement. This is the time for you to guide them in, seeing early wins and measurable results. The more you guide the customer, the more valuable the experience will be.

Engaging Emails are helping them to get more out of the product, so why wouldn't you ask them to do something that is an upgrade, up-sell, or recommendation? It sure beats a cold call to a customer, asking them to upgrade or increase their budget, when there has been no communication since their initial decision!



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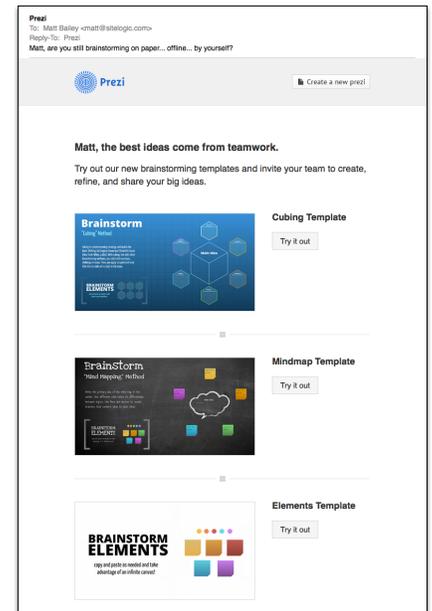
## Email 4: Purchase +60

After a little over a month of using the product, the “shininess” starts to wear off. If it does not become a regular tool in the business work, then it will not be used consistently. Using a new product, service, or tool must be done consistently, if it is to be incorporated into our regular work routine. It will most likely sit on the side, paid for, underused, and possibly forgotten.

Sooner or later, someone will wonder why they are paying for something they don't use, and the subscription or service will be cancelled. Worse yet, a competitor may have made a more compelling offer, but may not have the same comparable features. In this age, it may have nothing to do with who has a better product, but what information the customer ultimately retains.

This is a good time to get back in front of the customer and remind them of alternate reasons for their decision. In this case, Prezi showcases a product benefit that may not be obvious to the customer - it is a multitasking tool, and can be used in other ways!

The Email highlights templates to generate ideas for the customer. Prezi presents itself as another tool in the arsenal - increasing its value and relevance.



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## Email 5: Purchase +120

The final Email in this series was perfect.

A questionnaire. With one question. THE Question.

You may have seen it or been asked it before. It is based on a simple premise, and the implications are foundational to a company and their customer relationships.

Based on the book *The Ultimate Question*, this question and the resulting rating provides a measurement score of the attitude and perception of your customers. This is the NPS - Net Promoter Score.

If a customer rates the likelihood of referring the company to a colleague or friend 9 or 10, then they love the product/company. They are a Promoter.

A screenshot of an email from Amanda Richardson (prezi.com) to Matt Bailey. The email asks 'Would you recommend Prezi?' and includes a survey form. The form has a header 'Hi Matt,' followed by the text 'We'd love to get your help making Prezi better. If you could answer two quick questions it will help us give you a better experience.' Below this is a question: 'How likely is it that you would recommend Prezi to a friend or colleague?' with a rating scale from 0 to 10. The scale is represented by 10 circles, with the first 9 circles filled and the 10th circle empty. Below the scale is the text 'Not at all likely' and 'Very likely'. There is a text box for 'If you have time, we'd love to know why you gave us the rating you did.' and a 'Submit your answers' button. At the bottom, there is a link to the survey: 'Form not displaying properly? Take this survey at https://prezi.com/customer-satisfaction-survey/3d9d742869671/daily/'. The email also includes a thank you message from Amanda Richardson, Head of Product, Prezi, and a P.S. note: 'P.S.: I highly appreciate you taking the time to consider my request. If you would not like to receive similar inquiries regarding customer feedback or insights from me or Prezi.com in the future, please click this link: https://prezi.com/unsu/bsc3d9d742869671/daily/'.

If a customer rates the likelihood of referring the company to a colleague or friend a 7 or 8, then there is something holding them back. They like the company, but don't want to be seen "holding hands." There is something preventing a long-term commitment. However, they aren't negative toward the company. They are a Passive.

If a customer rates the likelihood of referring the company to a colleague or friend between a 0 and 6, then they do not like the company or the product. Generally, people tend to rate things higher (as people tend to be nice, not negative in surveys), but there is a problem. A major problem, and they can usually cite the specific issue that results in this rating. They are a Detractor.

Based on these ratings, a company can learn a lot about how they are perceived and how to address issues with the product, the service, or the company. It is the most fundamental feedback a company can receive - the importance of a referral.

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## Questionnaires and Feedback

I love this example from Prezi, as they maintain a level of communication by educating me on how to get more out of the product, thereby making it a better tool in my workflow.

In the last Email, the survey, I am now a participant in the process. By asking for my feedback, my opinion, and my rating, I am now a participant in the company and the ongoing improvement of the product. My perception of Prezi is that they take steps to educate people and ask for their opinions, and then use the feedback to improve the product. Even more, my investment may increase in value, as I provide valuable information to them in return.

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## A Word About Promoters

There is an entire chapter on referrals, but I need to address this here. Since I covered the NPS and the importance of feedback, it is certainly appropriate to explore this concept a bit more.

One of my goals in an NPS survey is to find my promoters, but even more so to find out who they are. I want to know as much as possible about my promoters and how they promote. Are they active on social media? Are they well-known in the industry? Sometimes we need to approach our marketing problems out of the digital "box," and go back to analog thinking.

I was surprised that there were not more opportunities to provide explicit information back to the company. For a product like this, I would certainly be interested as to:

- Who is using it?
- How many presentations do they give a year?
- To what kind of audiences?
- To how many people?
- Professional Speakers/Trainers?

- Corporate/Educations presentations?

Why? So I know who my power users, my influencers, are. Someone who uses the software in public will be a critical part of the word-of-mouth growth of the company. Knowing who they are would be a valuable key in the ongoing customer advocacy and marketing of the company.

I think you see where I'm going with this, but let's keep that for the next chapter....

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## Follow-up after the sale

How critical is the follow-up in handling buyer's remorse? A recent study by Inbox Group showed that a welcome series Email campaign averages 4x the open rate, 8x the click-through rate, and 5x the revenue, compared to other Email campaigns.

Why? Because alongside buyer's remorse is also excitement. Excitement at a new provider, at taking a chance on a smaller, more agile company, a chance to get noticed for making a forward-thinking decision. A chance to get better. And you have to help your prospects get there.

A new buyer is an excited buyer. Feeding customers the information they need at the right times keeps them hungry and excited, which also creates advocacy and referrals. It creates loyalty through a customer knowing that this company communicates well and often, and maybe "reads my mind." A welcome series prolongs the honeymoon and leverages the excitement of the customer, and the openness to follow-up communications.

Companies that recognize the buyer's risk, address the remorse, and educate them to get the most out of the product will not only increase the long-term relationship with the buyer, but also increase their bottom line revenue as well.



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Matt Bailey has taught:

- Google employees how to use Google Analytics,
- Experian how to present data,
- Proctor & Gamble and Johnson & Johnson SEO & online marketing.

Matt's aim to fame doesn't stop there... he has worked with a vast and widely-known clientele, including Microsoft, ESPN, IBM, Gerber Life, American Medical Association, Disney, American Greetings, Toys R' Us, and countless more. He keynotes conferences around the globe, speaking at more than 20 engagements a year, in addition to providing in-house training for companies.

According to The Direct Marketing Association: "No one else has approached the plain-English demystification of building an effective online presence as cost-effectively and time-effectively as has Matt."

He is the author of *Internet Marketing: An Hour a Day* (2011), *Wired to be Wowed* (2015), and *Teach New Dogs Old Tricks* (September, 2016).

When he isn't immersed in the universe of marketing and technology, Matt spends most of his time being a husband, a dad (to four girls) and whatever time is left is spent reading history, culture, or philosophy books. As a self-proclaimed coffee snob, he absolutely loves a good cup of Joe—especially while reading.

To find out much more about Matt, visit [www.sitelogicmarketing.com](http://www.sitelogicmarketing.com)