IT PAYS TO GET PERSONAL:

How to scale sales outreach personalization using AI

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Rocco Savage

Uncover Growth Strategies with Regie.ai

Hey Rocco,

Saw your tweet - do you feel you're playing detective trying to find growth opportunities?

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Best,
Nina, Regie.ai

Rapid Writer has written your personalized emails using persona
Head of marketing

Send

Subject: AI-Powered Personalization for Marketing Ops

Hey Rocco,

Facing talent shortages in marketing ops? AI to the rescue! 😄 But seriously, how can you find a balance between AI assistance and keeping your brand's touch?

Regie.ai offers custom personalization, making it easier to create impactful sales and marketing copy without losing your unique voice. Interested in solving your talent shortage while maintaining you brand's identity?

Best,
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Generate

Seventy-one percent of consumers demand more personalized experiences — and 76% get frustrated when it doesn't happen — thanks in part to the rise of digital selling and a pandemic that distanced sellers from their buyers.

Personalized outreach is crucial to the success of B2B sales teams across industries, and sales leaders must equip their teams with the knowledge and skills they need to sell within changing market conditions. "If it's a cold call, email, or DM, you need to have a personalized approach and some sort of relevance to their why," says Joey Alvandi, Account Executive at Tourial. "Spray and pray canned messages will not get a response."

In fact, Alvandi has been testing the use of a personal tie-in with his message in his outreach. Over the last year and half, he's seen better results sending 10 highly personalized messages over 100 generic notes.

Stephanie White, Senior Director of Revenue Enablement at Loopio, points out that the shift to digital transactions requires sales reps to shift their personalization strategies too: "When we were meeting customers and prospects physically where they were in offices and conferences, personalization came in nuanced, social ways, like remembering how someone took their coffee, their preference for a lunch spot, etc. As sales has become increasingly virtual, personalization is much more deliberate and intentional, requiring research, strategy, and structure to deliver messaging that lands."

However, training your team to get personal can be costly and time intensive without the right resources. Prior to recent technological advancements, true personalization took painstakingly long, and personalization at scale only went as far as the persona level. That is, until Generative AI arrived.

With the roll out of ChatGPT, Google's Bard, and other Generative AI platforms, AI has boomed, becoming more prevalent in consumer consciousness. **Studies show** that companies that adopt AI decreased costs and increased revenue attainment. Using Generative AI, we can now personalize in ways we couldn't before. AI can synthesize trillions of data points on our buyers and our business in seconds, providing infinite ways to better personalize the buyer's journey and relate on a personal level.

In this ebook, we share insights from sales and revenue leaders about their philosophy on personalization, how they train their sales organizations, and ways that AI can theoretically and practically help scale sales outreach personalization.

What sales outreach personalization means for your bottom line

Over the last few years, the seller's journey has been replaced by the buyer's journey. Customers are now empowered to do research on their own, evaluate solutions independently, and talk to sales reps only when they are ready to do so. Sales reps who want to influence their buying decisions shouldn't disrupt this journey, but instead flow into it seamlessly by addressing buyers specifically and targeting them using relevant messaging. When buyers suspect that you're delivering a canned message, they are more likely to ignore you.

Indeed, the prominence of digital transactions has created an environment in which B2B buyers expect the same kind of personalization that they receive in their B2C transactions. The bar has been raised, and businesses that can't meet the new standards are at risk of losing market share.

According to **McKinsey**, 72% of consumers expect to be treated as individuals. That is, they expect companies to know who they are, their likes and dislikes, and tailor their outreach and offerings to meet their specific needs. Even more, 78% of consumers are likely to repurchase when they receive personalized messaging and offers, and are also more likely to refer the business to their friends and family.

Beyond that, **Gartner** states that 86% of B2B customers expect companies to be well informed about their personal information during an interaction. This means truly knowing your prospect: who they are, what their goals are, and what they are trying to achieve personally and professionally. It's not enough to generalize based on their role in the business; now you need to understand what makes them tick, and therefore more likely to buy.

Just look at the difference in email response rates. The **average response rate** of advanced personalized emails (those including custom snippets beyond {{first_name}} or {{company_name}}) is 17%. On the flip side, the emails without advanced personalization resulted in a 7% response rate. It's no surprise, then, that companies that embrace personalization drive more revenue than their counterparts, experiencing **40% higher revenue growth** when executing personalization outreach versus their counterparts.

Successful sales leaders empower their SDRs and AEs with the tools and techniques they need to deliver relevant and impactful personalized messages. This means working with marketing to develop tone of voice and product messaging, while reps put their own spin on style. As Gino Donati, Sales Development Director at Superhuman, says, "Marketing owns value prop, tone, and sentiment. Sales owns personalization." Similarly, Jon Zoob, VP of Revenue at Postal, says that marketing creates the templates and sequencing framework while each rep is responsible for personalized subject lines.

White argues that "People buy from people, so ensuring sellers can show their personalities in a way that complements company messaging is important."

While personalization is key to a successful sales strategy, it can be difficult to align all of the moving parts needed to reap the benefits in a time-efficient manner.

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> **Stephanie White**
> Senior Director of Revenue Enablement at Loopio

🔍 CASE IN POINT

Learn how Sr. **Director of Marketing, Shelby Bozekowski, unites the marketing and sales teams at Omni Interactions** using Regie.ai to create on-brand, and personalized, persona based sequencing and messaging for front line reps in minutes.

What gets in the way of personalization?

While personalization is crucial to successful sales outreach, it can take a long time to get right — and hiring a top tier sales team is only the first step. Like everything else, it's a skill that has to be honed and sharpened, and sales leaders have to address this fact before they see success.

One issue that might impede personalization, for example, is the idea that more activity means more results. According to **Harvard Business Review**, "busyness harms the bottom line by reducing staff engagement and increasing absenteeism." Donati says that one reason sales reps might not spend as much time as they should personalizing their messages is that "they are just playing a numbers game and believe that no matter what, sales is a numbers game." Of course, outreach is more nuanced than that; as Donati argues, "There are times to write love letters, and there are times to send text messages."

Other processes and practices that might get in the way of personalization include:

Lengthy content creation process

Zoob says that content creation takes about 3-5 minutes per email of outbound prospecting. While the time is spent researching and copywriting, he says the AEs don't like spending that much time per email.

For White's team, the length of the content creation process depends on the concept and goal. "It can take a few hours [to execute] a large, complex campaign. [It's] a fine balance between getting it right and getting it out."

5

For Alvandi, the problem is one of scale. "Sometimes it takes longer when the person you are targeting isn't socially out there about who they are as a person. If they only repost their company jargon, it's harder to crack what language could excite this person."

SDRs get too precious about the content

> "...encourage reps to find one great element you can tie to a pain or challenge that your product solves, [ensuring] personalization doesn't come at the cost of activity."
>
> **Stephanie White**
> Senior Director of Revenue
> Enablement at Loopio

Understandably, when personalizing emails, SDRs want to spend time crafting an impactful message and getting it right. However, as Donati points out, some SDRs are perfectionists and might overthink this part of the process. Relatedly, some are more risk averse and scared of making mistakes, being extra thoughtful of the words they are putting into play.

For Donati's team at Superhuman, content creation "can take anywhere from 1 week to 6 months," and the most time consuming part of the process is the "ticky tack moments between approving verbiage on things that don't matter. People don't spend nearly as much time reading emails as people spend writing them."

White advises leaders to "encourage reps to find one great element you can tie to a pain or challenge that your product solves, [ensuring] personalization doesn't come at the cost of activity."

Insufficient training

Great sales reps aren't born, they're made. Traditional SDR roles are often entry level, and many who take on this role are still finetuning their sales chops. Though many are beginners, they still need to be tech savvy, great researchers, excellent writers, and superb relationship builders. This role demands a lot of skills from one person, and can often be a block to personalization, so sales leaders have to put in the time and effort to train up their teams to handle the demands of effective selling, which includes personalization.

Ashley Kelly, VP of Global Sales Development at Rippling, says that a very low percentage of her reps are skilled in personalized prospecting — only about 1%. On the other hand, Zoob says about 50% of his SDRs and full cycle reps are skilled at this.

Likewise Donati says that around 75% of his reps are skilled in personalization. "It takes about 90 days to get there if you focus on this work every day for months." He believes that personalization can be taught. "If the [sales reps] care about improving their work, they can learn how to prospect with personalized messaging."

The success of your personalization efforts depends largely on the time sales leaders put into training their team and getting them up to speed on best practices. Thankfully, there is technology available to help you scale content creation and personalized messaging while also helping you monitor what is and isn't working with your team's personalization efforts.

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Gino Donati
Sales Development Director at Superhuman

How AI helps scale personalized sales outreach

Fortunately, sales teams don't have to choose between personalization and scale. Lack of training and insufficient tooling can unnecessarily lengthen the process, but with innovative AI technology, sales leaders can empower their reps to create relevant messaging for prospective buyers.

Generative AI — algorithms used to create new content — is trending in modern businesses, and can be used to supplement outreach efforts. AI in sales outreach is multifaceted, and it can enable sales teams to create strong personalized messages for prospective customers. "AI will never replace humans," says Donati. "If you are cutting and copying and pasting, and that is all you do in your work, you should be replaced by AI. AI doesn't replace, it reallocates."

Sales organizations can use AI to determine not just who to talk to, but how to talk to them in their language, helping them to generate copy based on their goals and values. One key thing to note is that reps should never get free reign to write whatever they want. The quality of AI is largely dependent on inputs, so sales reps need guardrails for best practices, pre-approved language, persona pain points, and value props in order to create quality emails with consistent messaging. Alvandi, for example, uses **Regie.ai** to get personalized email ideas and gauge where he can make additions to emails. Regie.ai sets a great framework for his "Joey flair." "No tool will take you all the way there," says Alvandi, "but Regie gives [me] a bit of a cheat sheet."

According to White, "The potential [of AI] is really interesting, but the biggest challenge today is finding the right balance between scale/speed and ensuring consistency in the "voice" of the brand." Still, she states that "Writer's block is a real challenge at times, and leveraging AI can help provide prompts to get creative new ideas flowing more

efficiently. Of course, the balance is ensuring it's used as an initial guide only for you to add your expert insights to the content."

🔍 CASE IN POINT

Learn how **Will Reyes, SDR Team Lead at Crunchbase**, used Regie.ai and Generative AI to streamline content creation and ensure consistency in outbound messaging to improve open rates to 61% and reply rates to 16%.

AI can help teams with the heavy lifting of scaling personalization. Reps can reallocate the time intensive parts of the prospecting process, which tends to be the prospect research stage, using AI to spend more time selling. "The most time consuming part of the process is coming up with ideas on what the posts would be about," says Alvandi. "This is the same for cold messaging. Having a tool to get a baseline of where to start is huge." In other words, it's easier for a rep to be put directly into a content editing seat versus creating something new from scratch for each prospect message.

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>
> **Joey Alvandi**
> Account Executive at Tourial

With AI for sales outreach as part of your tech stack, SDRs and AEs can generate personalized content for prospects, helping them attract and convert new customers.

It pays to get personal

Effective sales outreach personalization can be the difference between hitting sales targets and falling short. Today's consumers are increasingly sensitive to outreach efforts that target them as individuals rather than as job titles, and sales teams that cater to their particular needs are more likely to see success. Sales teams that use Generative AI tend to be a lot more precise in their sales messaging, whereas teams not using AI are at a comparatively significant disadvantage with messaging discrepancies.

🔍 CASE IN POINT

Learn how **Catapult Solutions Group** tackled complex GTM problems involving hyper-personalization, crafting compelling material, and effective messaging at scale while streamlining their tech stack, using Generative AI.

The benefits of personalization are well documented, but without the necessary technology to make it happen, the chasm between strategy and execution is frustratingly wide. Fortunately, with Generative AI technology, sales leaders can effectively scale personalization and give their teams the best chance of success. While AI won't replace human effort, it can take some of the more time consuming portions of outreach — like prospect research and creating relevant sales messages based on those insights — off sales reps' plates and provide a strong foundation to build on.

Leveraging AI will maximize sales efforts, help convert prospects, enable sales teams to generate more pipeline, and ultimately, have happier prospects. In fact, personalized CTAs **convert 202% better** than generic ones, and generate a **1.7x growth in revenue** year over year. Businesses that don't take advantage of personalization end up leaving money on the table.

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