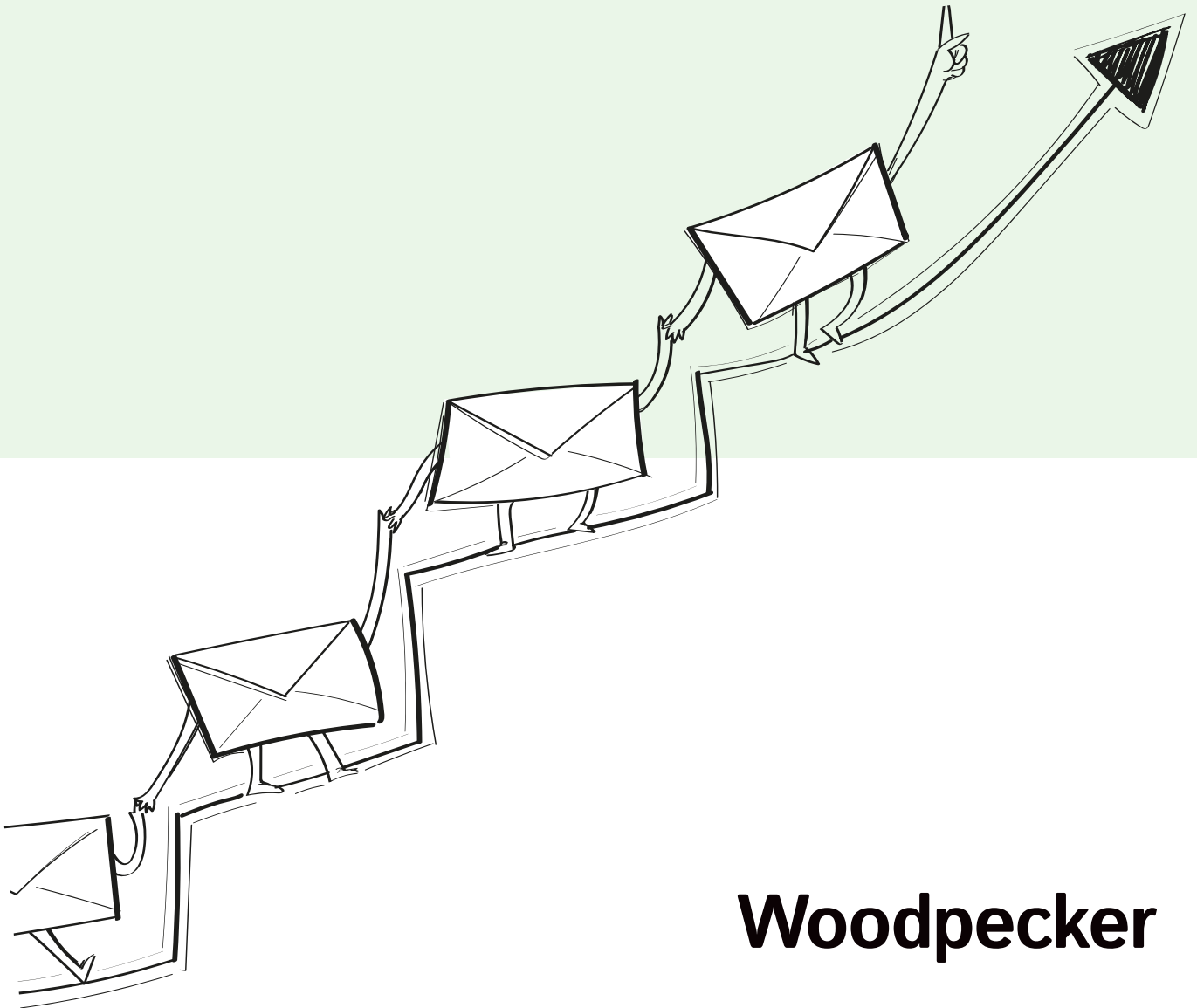


FREE TEMPLATES

How to grow SaaS with email

feat. top saas experts



Woodpecker

How to Grow SaaS with Email

feat. Top SaaS Experts

Ah, email. I've heard that thousands of times. Is this really still the way to go if I want to grow my SaaS?

Yes. Yes it is.

But for it to bring results, you need to do it properly. In a nutshell, it comes down to sending automated emails at scale without losing the human-to-human vibe. In more detail... well, that's why I've written this ebook.

Techniques described here aren't cookie-cutter solutions. They take time, but they work. We've tested them for ourselves, and invited top SaaS experts to chime in on the topic.

So hop on and see how to make your SaaS thrive.

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Table of contents

1 So you have a business idea. Now what?	7
1.1 Find your (future) best customers	8
1.2 Cut the fluff and get honest feedback	9
1.3 Reach out with email	11
2 How do you get more people to visit your website?	13
2.1 So, how do you get yourself some of those high quality backlinks?	14
2.2 But wait... why bother? Lemme just get some cash and go buy some links!	15
3 Create, promote, nurture. Repeat	17
3.1 A few words on quality content	17
3.2 How important is content promotion?	19
3.3 How to nurture inbound leads with email?	19
4 Create reply-worthy sales emails	21
4.1 Educate your prospects	22
4.2 Before you start writing cold emails	22
4.3 Building a cold outreach strategy	23
4.4 Test, optimize, repeat	25

5 Turning free trial users into customers	28
5.1 What determines when users are going to convert?	29
5.2 So what emails can you put in your user onboarding sequence to boost your trial engagement?	30
5.3 What to avoid in your user onboarding emails?	36
6 How to bring back those who didn't convert?	37
6.1 How do you know which leads are worth reigniting the conversation with?	38
6.2 What to put in the re-engaging emails?	38
7 Welcoming your customers aboard	42
7.1 Decreasing time to first value	43
7.2 How to move your customers towards their goals with email?	44
8 Offer additional value to your customer base	48
8.1 The right customers	48
8.2 The right offer	49
8.2 The right time	49
9 Emails that boost your webinar ROI	54
9.1 Webinar invite	51
9.2 Engagement emails	53
9.3 Follow-up after webinar	54

10 Improve CX, retain customers & develop a product they'll love	56
10.1 Customer feedback loop in SaaS	57
10.2 Getting the feedback & closing the loop	57
11 Customer testimonials -- how do you get them?	61
11.1 Why do you need testimonials for your business?	61
11.2 How do you write a testimonial request email?	62
12 Fuel your partner base	63
12.1 Take a look at your IPP	63
12.2 Reaching out to potential partners	64
13 Handle your PR	66
13.1 How to pitch to journalists to get coverage?	66
14 The power of networking emails	69
14.1 Reach out before the event	69
14.2 Reach out after the event	71



Use email to **validate a business idea**

1| So you have a business idea. Now what?

SaaS growth expert Corey Haines says the most common mistake SaaS businesses make at this stage is that they spend 6-12 months building a product without talking to anyone and end up launching something that no one wants.

So ask first, develop next.

One thing you need to remember is that when you're up to validate your business idea, you're not really VALIDATING it. It's more of a seeking-the-truth kind of thing. And the truth might be that your idea sucks. Or seems awesome when you talk about it with your friends, but once you actually build a product, it turns out there isn't really much demand for it.

So how do you find out whether yours is an idea that stands a chance in the tough business world?

You talk to people. And by people, I don't mean your best friend, mom and an uncle that happens to be visiting. I mean people who you think would be your ideal customers.

How do you start?

1.1 Find your (future) best customers

First, you need to determine whether the problem you're trying to solve really exists, and if it really is as big of a problem as you believe it to be.

To do so, you need to think about who you're going to target.

When thinking about a product, your goal (at least at the beginning) should be to make an amazing product for a very specific customer segment. If you go for a pretty-okay one for a wide audience, you might soon find yourself in a pickle. An everyone-wants-something-else-and-yet-they're-still-only-somewhat-content-when-I-give-them-what-they-ask-for sort of a pickle.

You can't make everyone happy, so get specific. Who do you want to target?

Is it small companies in the finance industry? That's not specific enough. Pinpoint what exactly their problems are, what they struggle with on a daily basis, and what outcome they would want to get from a solution.

Now, as to where you can find them, I'd say try relevant Facebook & LinkedIn groups, fora for professionals and Q&A websites, such as Quora. Or just google them ("SaaS onboarding experts", "personal trainers US") and see where they hang out online.

Chances are that when you made up your idea, you did some research on the topic: read some articles, comments, and questions of your target audience -- so you already know what's the best place to find them.

If this step is still ahead of you, I'd strongly recommend you do it asap.

Now, when you've formed some assumptions, it's time to see if you were right.

1.2 Cut the fluff and get honest feedback

You need to prepare yourself a lil' set of questions you'd like to get the answers to. What do you want to learn from the prospects? You should have some assumptions and questions arising after your research -- build around these topics and keywords.

The issue here, though, might be that people sometimes lie to avoid saying something uncomfortable or critical.

So how do you get honest feedback that reflects what they're really thinking?

Corey says that **the key is not introducing bias, asking open ended questions, and really digging it until you get to the root of what someone is saying.**

Besides that, it's also a good idea to:

#1 not talk about your idea. Instead, try to determine if the problem really exists

Don't talk to them about your great new idea.

When you're talking about your product (or the idea of it), you're automatically shutting down the conversation about their workflow and pain points.

Which will, most probably, result in you learning squat about whether the problem exists or not, and hearing lots of (possibly false or at least exaggerated) compliments about your idea.

Why?

Seeing your enthusiasm and passion, people will rarely tell you that your idea sucks -- even if it does. They won't want to make things uncomfortable. They'll say that indeed, it does sound awesome, but will never buy it once it's out.

So instead, verify if the problem you're trying to solve really exists. And if it really is such a huge pain as you think it is.

What to ask, then?

Questions about their work processes, such as these ones:

- How are you doing X and Y, and what do you like/dislike about it?
- How were you solving this problem before the solution you're using currently?
- How much time and money does it cost you right now?

Those are just three examples, but you get the gist.

#2 be specific

Don't ask "Does this (the problem) happen often?".

Ask: "How many times did it happen in the last month?",
"When was the last time it happened?".

The same goes for other questions, such as...

- "How did you deal with this the last time?" instead of "How do you usually deal with it?"
- "How much time and money does it cost you?" instead of "How big of a struggle it is?"
- "Would you like to get on the waitlist?" instead of "Would you pay for it?" (this one's for the later stage conversations, though -- don't try to sell when you've only just started)

#3 ignore compliments, unless they're backed by data

If people say your product sounds awesome, don't take that as a confirmation of your assumptions.

If they say your product sounds awesome because of this and that -- that's when you have more proof that your idea could actually be a winning one.

But as Corey points out, the two most important metrics are pre-sales and subscribers.

If you get people to pre-order or subscribe to a waitlist or coming soon page (assuming they're qualified and a good fit for the future product), it's the ultimate demand confirmation. Your idea really is awesome and people will want to pay for it.

But this one's for the later stages of prospect conversations. When you're just starting them up and want to verify your business idea, focus solely on determining whether the problem exists and what the best solution would be.

If you handle the conversations well and offer a valuable product later on, chances are you might get a prospect list right there anyway -- but don't push into that direction. In the beginning your goal is to find out the truth.

And how many conversations should you have to find out the truth?



“

When talking to people, I generally use the rule of thumb to keep talking to people until you don't learn anything new. Usually that's 5-20 conversations, but it depends.

Corey Haines

1.3 Reach out with email

When is doing prospect interviews via email better than over a call?

- Your prospects work irregular hours
- They live in a galaxy far, far away... or at least in a different time zone
- They simply prefer to answer your questions via email



Pro tip: when you talk to your best (future) customers, keep notes of their exact language, so your copywriter can then use it for your website and ads copy.

Now let's see what an example email could look like in this case:



Subject: Looking for a personal trainer

Hey {{First_Name}},

I'm developing an app for personal trainers that can help them get new clients.

From your content on {{Platform}} I see you have lots of hands-on experience in the industry and in teaching people! Would you be open to answer 2-3 questions from me via email?

Best,

Laura

If they reply, you take it from there with the questions. If they don't, send them a follow-up like this one:



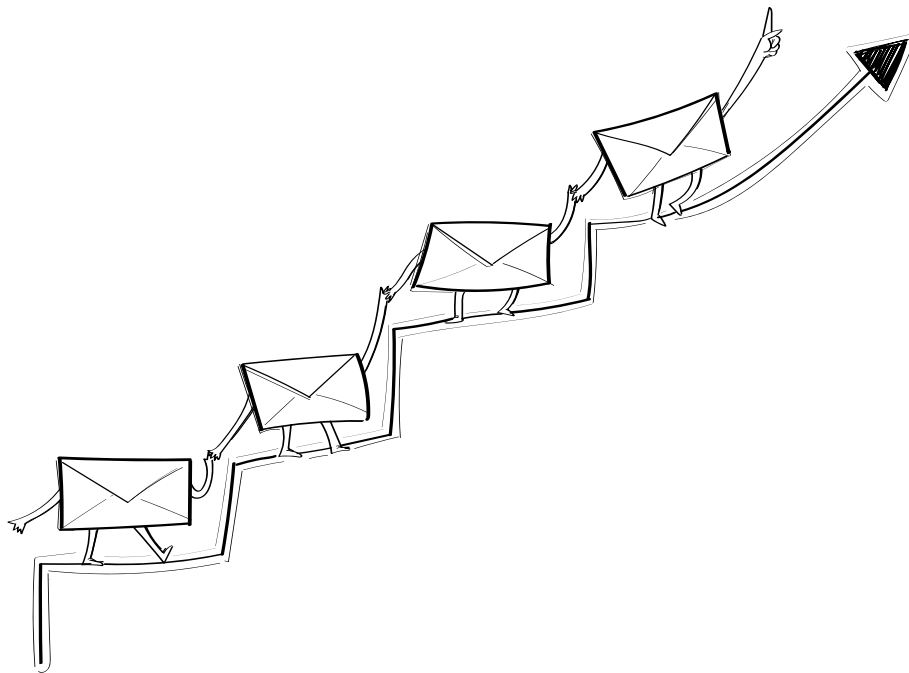
Hi {{First_Name}},

Would you be up to answering 2-3 questions that can help me develop a better app for personal trainers?

Let me know with a Y (yes) or N (no).

Best,

Laura



Use email to **drive traffic to your website**

2| How do you get more people to visit your website?

Like it or not, if your website doesn't rank high in the search engine, your business might suffer.

There's a wide variety of search engine optimization techniques that can bubble your site up in Google, and getting quality backlinks for your website is one of the most effective ones.

Imagine you're on vacation at Ibiza and planning to go out for dinner. Now, you've never been to Ibiza before, so you look up in the travel guide which restaurant will be a good choice. If you're going for quality - tasty food and excellent service - this seems better than just picking a place at random, doesn't it?

Now, imagine your friend went to Ibiza just before you did, and tested quite a lot of the local eateries. There was one he liked the most, and he strongly recommended you try it. You probably would, wouldn't you?

Backlinks work in a similar way for websites: if many websites point to yours, it's a signal for Google that it must be of good quality. And if many websites with high

authority point to your website, the signal is even stronger - like a recommendation from a friend is worth more than from a travel guide.

Want to score even higher? If the websites are topically relevant to yours, you're driving traffic that might result in getting customers as well.

2.1 So, how do you get yourself some of those high quality backlinks?

SEO expert Lukasz Zelezny points out 3 things you need to know:

1. A company website/blog that is worth linking to is an absolute must
2. Ask yourself this question: "Why should my link appear on their website?". If your one and only answer is: "My website will jump waaay up!", don't even bother them. Don't send emails to random websites
3. Similarly to #2, when you reach out to them, don't talk only about getting the link

With those in mind, let's move to the actual techniques.

#1 guest posts, interviews, customer case studies

Quality content is always a good way to sneak your link into. You provide value to the website, position yourself as an expert in a field, and get a backlink. It's a win-win-win.

#2 unlinked brand mentions

With the help of a social listening tool you can find who mentioned you online and ask to have the link to your website added.

#3 broken links

If you see a link that doesn't work and you have relevant content that can replace the previous one, reach out to the website owner. Chances are, they'll be grateful and put your link on their website.

#4 links pointing to your social media

From time to time someone will link to your social media profiles instead of to the website. You may contact them and ask to change the link.

#5 expert roundups

You can browse the web searching for expert roundups. When you stumble upon ones that are in your niche and relevant to your business, you can write a paragraph of your own and send it to the author.

2.2 But wait... why bother? Lemme just get some cash and go buy some links!



“

Well, I wouldn't take that route. Google doesn't allow any link manipulation, which means you can't offer anything in exchange for a backlink (money, stuff, a backlink in return).

Lukasz Zelezny

Not to be the bearer of the (possible) bad news, but they can actually penalize you and push your website down in the rank if you violate the rules.

Ain't nobody got time for that, right?

Here's an example of a guest post outreach email:



Hi {{First_Name}}

I've been a fan of the {{Company}} blog for a long time. I especially like {{Snippet_1}}.

Seems that the topics you cover are relevant to what I write about. Would you be open to me pitching some ideas for a guest post for your blog? Reply:

- A) Sure!
- B) Yeah, but no promises
- C) Don't bother

Best,
John Wayne

Follow-up:



Hey there {{First _Name}},

Would it be completely unreasonable if I sent over the article topics that I'd like to write for your blog?

- A) Send them over!
- B) Nah, don't bother -- and stop sending me those emails

Best,
John Wayne



Use email to nurture inbound leads

3| Create, promote, nurture. Repeat

You might have written some ebooks, hosted podcasts, or AMA sessions.

And when people downloaded your ebooks, listened to your podcast, or watched your AMA session, they left you their email addresses.

Which you can use to nurture the leads that have already shown some interest in your content.

3.1 A few words on quality content

I think it's safe to assume that by now you know that if you're creating content these days, so-so pieces won't do.

It doesn't mean that all you have to do from now on is make 3-hour long interviews with top industry leaders or write blog posts that cover in-depth every little detail of the topic (although Google prefers longer content).

It means that the content you're producing has to, first and foremost, bring value to the audience.

You might be recording amazing 5-minute videos packed with useful information, or creating quality bite-sized pieces of written content. As long as your focus is on providing value, you're good to go.

But before you sit in front of your computer and put your hands to the keyboard, ready to type away into the land of beautiful, fancy sentences that would amaze even Shakespeare himself, or hit the "record" button, what you need to decide first is who you're creating for.

Think about your target audience.

B2B SaaS marketing consultant Alan Gleeson suggests to determine what their pain points are and how you can help to solve their pain.

Learn about their life and create content that helps them.

And when you know your persona, there's a question you should be asking yourself.



“

The question you should be asking yourself when you're creating content is "How do I get this person promoted?". Start from the position of help and educate them.

Alan Gleeson

Don't sell. Help and educate.

When people engage with your content, you gain their trust and build familiarity, so when they're in need of a solution they'll turn to you.

What type of content you're going to choose, depends on your persona.

Remember, though, that your content pieces also need to be SEO pieces. Even the best content will get buried under other resources if it's not SEO-friendly.

3.2 How important is content promotion?

Ah, that is the question. To which the answer is: very. It's very important.

Producing content is just one piece of the jigsaw. You need to promote it properly to reap the full benefits.

It's obvious you'd like to get your content in front of as many people as possible, but how do you do so if you don't have a large audience yet?

One tip Alan shares is to know your contacts -- use their problems to write, and they can share the content and help it reach more people.

You should be making connections with your personas. Understand who's got the pain and target them with the content that demonstrates your expertise and the ability to fix the problem.

3.3 How to nurture inbound leads with email?

When you have their emails, you can recommend your other content. (Don't put them on your newsletter list, though, unless they've specifically agreed to it.)

Such a campaign might last for a long time, e.g. a year, during which you build awareness in your audience and validate yourself as an expert. Or you might build multiple campaigns for multiple content pieces.

It's a strategy for the long run -- you distribute your content and stay top of mind in the person's head. Then, when a time comes when they need to solve a certain problem, your solution will be the one that comes to their minds.

Eventually, you may divert the conversation into them signing up for a trial, but be careful with this -- if you do it too early, you might burn the lead.

Here's an example of what an inbound lead nurturing email could look like:



Subject: Sales & marketing podcast

Hi *{{First_Name}}*,

*I've noticed that you came to both of the webinars on *{{Topic}}* that I hosted with *{{Guest}}*, so I thought you might be interested in checking out our newest content -- a podcast series on sales & marketing.*

We've only just started and are so excited about this!

You can check episode 1 here>>

Any feedback is welcome!

Best,

Julie

Follow-up:



Hey *{{First_Name}}*,

Episode 2 of our new podcast dropped today!

We have a very special guest this time...

You can check episode 2 here>>

Have a great day,

Julie



Use email to get outbound leads

4| Create reply-worthy sales emails

You probably get a couple of cold emails every week yourself. They're annoying, right? Well, if they're ill-written and randomly-sent, indeed they are.

Someone sends you an email and rambles on about themselves and their company? Yuck. Thanks, that's a no from me.

But when well-composed and sent to carefully chosen prospects, they might make a world of a difference for your company.

Let's be honest here -- there are no cookie-cutter solutions that you can put to use once and make big bucks off without having to think about it ever again.

And let's face it - some of your campaigns probably will be unsuccessful. But there are certain guidelines you can follow to get positive replies -- instead of silence (and then maybe crickets chirping).

4.1 Educate your prospects

What in the world do I mean by that? Do I educate my prospects on what my product can do, or what they can achieve with it? Well, actually you need to take a couple of steps back and look at the bigger picture.

As SaaS sales coach Matt Wolach advises, you need to educate prospects on a shift that is happening or has happened in their industry.

What he means by that is a kind of an overall adjustment -- for example, for email right now it's personalizing the messages. It used to be just mass blasted emails and it would work. But now, when so many companies are taking on a more personal approach to customers, we've all been conditioned to personalization.

Imagine you got a cold email, but it has no personalization whatsoever -- not even your name. You'd just disregard it, wouldn't you?

That's just one example of such major shifts. It's companies who leverage them that are able to thrive.

And although Matt is talking about a part of a sales process in general, when you think about it, this is actually great advice for when you're writing a sales cold email.

4.2 Before you start writing cold emails

First things first - what should you do before starting cold email outreach?

Outbound marketing specialist Daniil Kopilevych chimed in with his advice on this. He suggests to first ask yourself 2 qualifying questions:

1. Can I come up with very specific answers to these 4 questions:

- Who to target? (market)
- What to sell? (product)
- Why should they buy? (USP)
- When to reach out? (why now?)

2. Can I produce a positive ROI/good LTV:CAC?



Outbound is typically the most expensive channel, so you need to have a high enough ARPU and LTV to justify the costs.

Daniil Kopilevych

How can you calculate it?

CAC through outbound -- details Daniil -- would typically be a sum of the following:

- a) salary of your lead generation specialists and sales reps (closers) – take only the part of their salary equivalent to the % of involvement in outbound sales processes into the equation
- b) tools – for finding and compiling a prospect base, finding emails, sending an email sequence, CRM

Got it? Great. Now take your top 5 customers who have the highest LTV and compare it with your CAC through outbound.

4.3 Building a cold outreach strategy

There are 3 main elements you need to take care of to turn your cold email campaign from no-opens to hit-reply:

- high-quality prospect list
- email copy that is personalized & relevant
- right sending strategy

High-quality prospect list

This means: prospects who you have good reason to think would be a great fit for your product. We say no to outreach done at random.

The better the list, the better the results of your campaign.

Email copy that is personalized & relevant

... and interesting.

Personalization will get you these two things: better deliverability (thanks to a more diversified content within a campaign) + more positive replies.

Don't talk about yourself.



Buyers don't care. They don't care about your company, how big it is, how amazing you are. They care about their problems, they care about their needs, their goals, their challenges, so if you start telling them all about your company, they'll tune out.

Matt Wolach

Focus on the prospect and the problem you'll be trying to help them solve, and on the big shift Matt was talking about earlier. Associate that shift with your product.

And even though you are trying to sell, don't do it in the first message. Try building a relationship with the prospect first.

And keeping your message interesting will make your prospects read through till the signature.

Right sending strategy

The best day of the week to send? It depends -- on your business niche, your prospect's workflow and habits, their location...

The best time of the day? Also depends.

To follow up or not to follow up?

Well, there is no question. Always follow up. Always. At Woodpecker we see time and again that [follow-ups bump up the reply rate](#).

4.4 Test, optimize, repeat

- **A/B testing**

Try different sending time and frequency with the next ones. Experiment with the subject line, email copy and number of follow-ups.

- **Campaign size**

Daniil advises to start lean. And we at Woodpecker stand behind this approach 100% -- always test the waters before you jump in.

As Daniil puts it, even if you make all the mistakes there are to be made in cold email outreach, starting lean helps you in two major ways:

→ you'll avoid getting your domain into a spam list

→ you'll gain a better understanding of your 4 cold email W's

If you've tested a certain cold outreach campaign and it worked on a smaller scale, then you should consider doing it on a bigger scale.

Big campaigns may work if you can afford to do them as effectively (or nearly as effectively) as on a smaller scale. Let's say you were doing research on each prospect in order to include a very personalized copy for each of the emails. If you can't afford to continue it that way on a bigger scale, you need to either adapt your level of personalization or think of other campaigns that have a chance to work on a bigger scale.



Subject: Is *{{Problem}}* still giving you a hard time?

*Hello *{{First_Name}}*,*

*It would take me exactly 5 minutes to explain how (your company) can help you get *{{Solution}}*.*

*We've worked with *{{Their_Competers_1}}* and *{{Results}}*.*

Would you be up to a 10-minute call on Thursday morning to discuss this?

*Best,
John*

Follow-up:



*We could help you get *{{Solution}}*.*

*It worked great for *{{Their_Competers_2}}*.*

Would you like to talk this over a call sometime next week?

*Best,
John*

Follow-up 2:



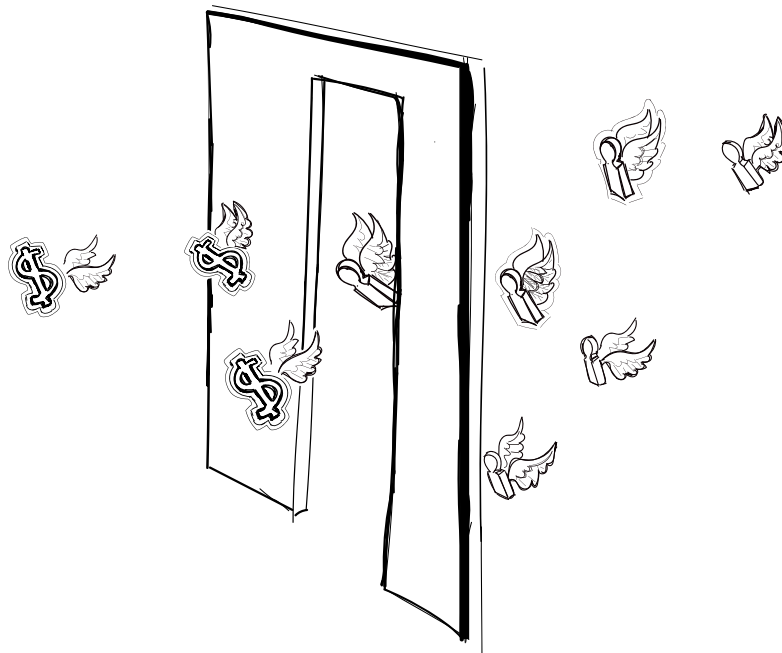
Hey {{First_Name}},

Are you interested in (what you're offering)?

Let me know so I can stop harassing you if the answer is no.

Best,

John



Use email to increase your trial to paid conversion

5| Turning free trial users into customers

Free trial is a sample of what your product can do for the users. They take it for a test drive to see if that's the vehicle that will get them where they want to go.

When you're building a user onboarding process, the single most important thing is -- as product-led growth expert Wes Bush puts it -- to help people get better at what your product enables them to do.

To do so, you need to take a look at the big picture and learn why they're using your product. What's the context?



“

This may sound straightforward, but many businesses don't know the big context behind their product. As a result, they unknowingly force unnecessary steps onto users in the onboarding process.

Wes Bush

When Woodpecker users [sign up for the free trial](#), they use the tool to generate leads, increase their trial to paid conversion, drive traffic to their websites... and all the other stuff I'm talking about in this ebook (wink-wink).

With the context in mind, you'll be able to onboard users by showing them only the necessary steps that'll move them towards their desired outcome.

5.1 What determines when users are going to convert?

According to product growth expert Michal Fiech, it depends on a couple of factors.

If you put trial users on a full-featured plan, most of them will pay right before the trial ends (or even after).

If you design your trial to offer limited features, you might be able to speed up the process -- you need to make sure that users who reached the "aha" moment have to convert to keep using the tool in a more efficient way.

Another factor is how and when you nudge the users to pay.

Creating an account-wide notification system when the trial is about to expire is one way to nudge the users to pay faster.

So if you'd like to give them a lil' nudge, which channel would be the most effective?



The product itself. Designing user flows in the product is the most crucial thing. Then all various notifications, such as emails, push, in-apps, on top of that.

Michal Fiech

5.2 So what emails can you put in your user onboarding sequence to boost your trial engagement?

The types and number of emails you send depends entirely on your strategy -- you might do more, you might do less, you might send different kinds of messages. But if you don't know where to start, try these 5 emails that Wes singles out as the main ones when onboarding users:

1. Welcome email
2. Usage tips
3. Sales touches
4. Usage reviews
5. Expiry warning



Pro tip: don't use html in your onboarding sequence. Plain and simple is the way to go. Pictures and elaborate graphic templates might confuse users or divert your messages from the main inbox.

Now...

Welcome email

The first email in the sequence has two main functions: to build a habit in your audience to open your emails and set the users' expectations on what's next.

What you put between the "thank you" and your CTA will vary. Do you want your welcome email to be more of an introductory one? To ask what job the user wants to get done with your product? To build a connection with them? Or pull them into the product?



Subject: Hi {{First_Name}}, great to see you!

Hi {{First_Name}},

Thanks for signing up to (your tool)! It's awesome to see you here.

We've built our app to help professionals like you (what your product helps with).

I want you to get the most out of it, so I'll be sending some resources your way in the next few days.

First up: 15 tips to help you (what they want to achieve).

In the meantime, feel free to drop me any questions that may arise.

Best,

Dave

Usage tips

This one focuses more on your product's features and what they can do for the user.

So, you might want to direct the user to a specific place in the app, offer best practices tips, try to bring abandoned users back, or link to specific blog posts or help articles.

So, for example, you might want to:

- direct the user to a specific place in the app,
- offer best practices tips,
- try to bring abandoned users back, or
- link to specific blog posts or help articles.



Hey {{First_Name}},

Your first (element) is up and running!

Why not set up (another element) next?

Here's a short video to help you with the setup>>

See for yourself how it can (help them to get closer to their desired outcome)!

Talk soon,

Dave

Sales touches

While all the emails should be personal, this should be super personal.

You can e.g. celebrate the user's success in your app (aka, them achieving the "aha" moment) and offer how they can use it to get more out of the product, ask if they have any questions, or offer them a demo.

Your goal with this email is to make sure the user achieves more with your product.



Hey {{First_Name}},

Wow, time sure flies! You're already halfway through your trial.

Did any questions come up? I'd be happy to walk you through the app and show what else you can get done -- and how.

Feel free to pick a slot for a demo from my calendly>>

Talk soon,

Dave

Usage reviews

Show the user how much they've achieved with your product so far and offer a suggestion for what they can do next.

Use metrics -- pick the key metric for your product.

Thanks to this, the users will see the value quicker.



Hi {First_Name},

Congrats! You've reached (whatever it is users can reach in your product).

That's quite impressive. What would you say about (increasing the results by using another feature)? [Click here to smooth your process>>](#)

Best,

Dave

Expiry warnings

Aka, reminders that the trial will expire in a week/few days.

If your free trial requires a credit card, you have to send these.

With this email, it's easy to slip into a salesy tone -- but don't be pushy. Be helpful.



Hi {{First_Name}},

Thanks for using (your product)! Hope you've enjoyed it so far.

Just wanted to remind you that your trial is about to expire in a few days (June 29).

You'll still have access to your data after it ends, but won't be able to perform any actions.

If you have any questions, just hit reply :)

If you'd like to keep using (your product), you can subscribe here>>

*Best,
Dave*

5.3 What to avoid in your user onboarding emails?

- Don't assume users will be ready to buy straight away
- Don't focus on your benefit instead of theirs
- Don't send one-to-all kind of messages with no personalization
- Don't try to seal the deal no matter what

If you're using a tool that sends time-based emails (instead of behavior-based), be sure you're:

- Answering common questions and objections at a given stage of the funnel
- Educating users on how you can solve their pain point
- Focusing on the benefits, not features of your product
- Offering a clear CTA (and just one)



Pro tip: You might segment your trial user base and set up two different types of campaigns: one that is aimed at the users that best fit your ICP (this campaign is personalized and aimed at starting a conversation with the lead), and a different one that onboards the users that are less likely to convert into paying customers (still personalized, but not focused on as much contact with a salesperson).



Use email to re-engage lost leads

6| How to bring back those who didn't convert?

Lost leads – the ones who took your product for a run, but decided not to go through with it when the trial ended – are often a neglected audience in SaaS businesses.

But when your trial users don't convert, don't abandon hope yet, all of you who offer free trials. There's still a chance to bring them back.

How?

Duh -- with email.

6.1 How do you know which leads are worth reigniting the conversation with?

Let's first take a look at the list.

Do you just send a campaign to all of those who didn't convert? Or do you single out a specific group, e.g. those who were more invested?

As SaaS user onboarding specialist Aaron Krall says, it depends on how big the list is and on the customer value.

If you've got, let's say, 100,000 expired trials, there's no way to analyze at scale each and every lead to figure out why they cancelled or how interested they were. So what's crucial here is to segment the leads in some way -- when you reach out to them, you'll be able to speak to their specific pain points and needs.

This will mean re-engaging them in their unique pain language, as opposed to one general email blast to everyone.

6.2 What to put in the re-engaging emails?

When you're reaching out to people who -- for whatever reason -- decided not to upgrade to a paid plan, you need to step up your game. Take out the big guns.

What should you put in the opening email?

- reintroduce yourself and offer the prospects' some context -- remind them who you are and what your tool does
- tell them how come you've got their email address
- focus on providing them value, not selling -- offer to share a valuable piece of content or information on a topic you believe they'd be interested in
- give them a way to opt-out -- this might actually nudge them to respond

Or you might reach out to them after you've rolled out a new important feature, letting them know that your product has changed.

Aaron's approach here is to run a troubleshooting campaign to find out the reason the leads didn't move on to a paid plan.



“

This campaign should be super simple, fun and engaging for the user. It's really hard to get feedback from a user once the trial is over and they didn't convert, so you've got to have fun with that initial troubleshooting email.

Aaron Krall

After this, his strategy involves breaking up the emails into 5 different categories and sending at least 2 messages a month.

According to Aaron, one category which is mostly overlooked is “objections”.

Usually someone didn't buy because of an objection (assuming they're the right fit), so addressing these objections in addition to showing prospects how your tool can solve their problems and make their life easier is what will bring them back into the tool.

One thing that might entice them to re-try is offering to extend the trial, creating very little risk to come back.

This sequence goes on until the prospect unsubscribes, signs up for the trial again, or doesn't open any of the emails -- in which case it's best to remove them from the list to maintain a high deliverability rate.

Note: Remember that you can't keep prospects' data in your files forever, though.

Although personal data acts, such as GDPR, don't state precisely for how long it is OK to store it, you need to have a very good and specific reason for doing so.

Here's how an opening email in a lost lead re-engagement sequence could look like:



Subject: (your product) free trial, no strings

Hey {{First_Name}},

Sarah from (your company) here.

It's been a couple months since you tested (your product). How are things going over at {{Company}}?

Did you manage to (solve the problem they were having) yet? If so, I'd really like to hear what solution worked for you!

We've been working full-blast for the past months, too, and I'm super excited to share that we've just rolled a new feature -- {{Feature}} -- that can help with (specific pain point of theirs).

Interested in trying it out in a free 14-day trial?

*Best,
Sarah*

Or:



Subject: Is (your product) hot or not?

Hey there, {{First_Name}}!

A while ago you signed up for (your product), but decided not to stick around after the trial.

Would you mind sharing what was the reason behind this?

- 1) I didn't find it to be that valuable*
- 2) I had other budget priorities*
- 3) I dunno, just leave me alone*

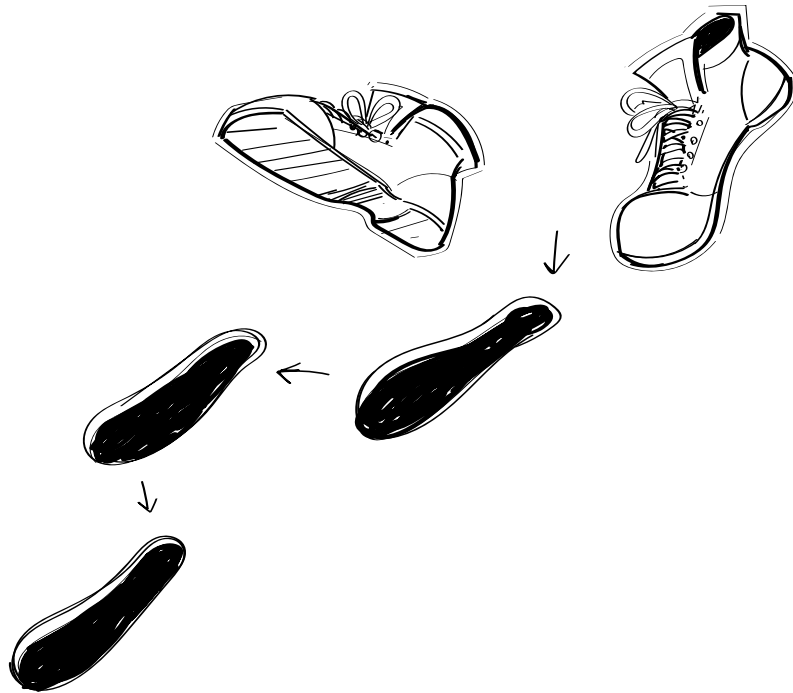
Hope to hear from you!

Best,

Sarah

PS If you'd rather not hear from me ever again, just reply with a 3) :)

It's worth it to give it a shot -- might turn out that lost leads aren't lost after all.



Use email to onboard customers

7| Welcoming your customers aboard

With so many options and the possibility of customers switching to a different solution, providing a quality customer experience is key these days to make them stick around. And a proper onboarding process is one of the most important factors that determine whether the customer will stay with your product or ditch it.

As B2B SaaS consultant Nichole Elizabeth DeMeré says, the onboarding process is where we really win or lose customers -- and the surest way to win them is to show them value.



“

We can personalize emails and in-app experiences to nudge people towards making real progress. We have that technology. And I predict that, when customers are tired of being manipulated into forming habits that may not be in their best interests, they will gravitate towards products that are genuinely designed to help them become better versions of themselves.

Nichole Elizabeth deMeré

7.1 Decreasing time to first value

Are you charting your customer success milestones into the onboarding process? If you just nodded your head, that's awesome! But there's one step you might be missing.

You've done all the research on your target customer and know what they want to do and need to get done with your product. And you are building milestones into your product to keep them on track.

But there might be one missing link.

As Nichole points out, it's easy to assume that time to first value is the same as time to the first milestone.

Well, it isn't.

TTFV is how much time it takes for the customer to get real, tangible value from using your product. And this is “value” by their definition, not yours. This first value is probably going to be related to your value proposition -- the promise that got your customers in the door in the first place.

And your goal in an onboarding process is to guide them towards that success -- as swiftly as you can.

Think of actions that can bring them fast, positive results.

These “quick wins” should happen fast enough to prove that your product is worth the time and money before the customer loses interest (or patience).

Remember -- the customers who see the most value in your product are the ones that will stay aboard.

7.2 How to move your customers towards their goals with email?

learn what outcome they are trying to achieve

share tips and content that will offer a series of quick wins and, ultimately, guide them towards success (their definition of success) and seeing the true value of your product

keep track of whether they're reaching their milestones and if not, react with additional resources or training

personalization is the way to go -- don't lose the human vibe even when you're sending onboarding emails at scale

So what do you say in the first email, right after a customer upgrades to a paid plan?

You:

- make them feel welcome and introduce yourself as the person they can turn to when they need help
- offer a tip or share a link to a tutorial/content that'll help them get to the first win
- ask them why they signed up



Hi *{{First_Name}}*!

My name is Michael and I'm a Customer Success Manager at BigFish.io. Thrilled to see you aboard! Hope your experience with our tool will be nothing short of amazing.

It's my pleasure to help you reach success -- so let's start with the basics.

To be able to reap the full benefits of our app, you first need to generate an API key and add it to your CRM. Here's a step-by-step video on how to do it.

I'll be sending some other helpful resources your way in the next few days, but first I'd like to ask you a question -- what are you going to use BigFish for?

Feel free to reach out if you need help with anything else right now. In the meantime, have a great day!

*Regards,
Michael*

From there the sequence might divert in different directions.

With an active customer you could:

- send them customer stories
- provide next tips and content on how to get the most out of your product
- show useful integrations
- check in to see if everything's as it should be (be proactive)



Hi {{First_Name}},

I see you're doing great with BigFish -- congrats on {{Customer_Success}}!

I thought you might be interested in seeing how {{Company}} {{Action}}. They're quite similar to you, so you might find some useful tips for yourself in the story.

If you have any questions, just let me know.

Best,

Michael

With an inactive customer you could:

- nudge them to take the first step
- ask why they haven't logged in lately
- offer to walk them through the product or help in another way
- share customer stories as well.



Hi {{First_Name}},

I've noticed that it's been a while since you last logged in to BigFish. Do you need any help with the next step?

If so, just drop me a line -- I'd be happy to help!

*Best,
Michael*

Customer experience is the most important factor for fighting churn -- so be sure to take good care of it.



Use email to upsell & cross-sell your customers

8| Offer additional value to your customer base

As your company grows, hopefully so do your customers' businesses -- and the relationship you've built with them expands as well.

To be able to successfully up- or cross-sell your customers in SaaS, you need to reach out to the right customers with the right offer at the right time.

8.1 The right customers

It's a no-brainer that you need to keep very good track of who's using what before you try to cross- or upsell. It would be a shame to offer an add-on to a customer that's already using it, wouldn't it? Not only would you fail to sell, but also damage your (and the company's) reputation.

That's another thing -- if you're too pushy, you might harm the reputation as well.

You've talked to those customers before and built a relationship with them. They know and trust you, so use that when reaching out to them. But tread lightly not to ruin it.

8.2 The right offer

The key word is: relevance. You should ask yourself “How can I help them reach their goals easier, faster, with less hassle?”. If your focus is on the customer value all the way, you’re going in for the win.

You’ll increase the company’s revenue, and they’ll be happier with your product and stick around for longer.

8.3 The right time

When’s the best time to up- or cross-sell?

- when the customer hits a milestone and is successful
- And by “customer is successful” I mean success as defined by the customer --which may not necessarily be what you think it is.
- when you see they’re struggling with something and your offer will help them alleviate that pain
- it might also be when you’ve rolled out a new feature or product that they could find useful



Pro tip: If you feel at a loss as to what to start with, one suggestion is to pick only your best customers and reach out to them first.

So...

- leverage your relationship with the customer
- offer them value
- don’t be pushy

Keep those 3 things in mind when you’re sending a cross- or upsell email sequence.



Hi {{First_Name}},

How are things going at {{Company}}? It's been a while since we talked.
Hope you've had lots of success with our {{Snippet_1}}!

I'm reaching out because we've just rolled out a new feature that I think you'd love. {{Snippet_2}} will allow you to {{Snippet_3}}.

Would you be up for a quick call next Monday or Wednesday?

Best,
Kylie



Use email to increase your webinar ROI

9| Emails that boost your webinar ROI

Reminder or sign-up notification emails are one thing (and they're super important), but they won't really do much for boosting your webinar conversion.

What emails can you send to increase your webinar ROI?

9.1 Webinar invite

You're surely promoting your webinar on social media, on your website, and in a newsletter. But you can give your sign-ups a boost if you personally reach out to people you believe could be interested in the topic of your webinar.

Where can you find them?

LinkedIn, Quora, relevant foras. Where do the people that are interested in the topic tend to hang out online? Go there.



Pro tip: reach out to the leaders of such forums/groups. If they're in and agree to spread a good word about your webinar, there's a bigger chance that the members will take interest as well.

You may also consider searching through your customer base and segmenting out those who might be interested. Shoot them an invite as well.

And even though doing all this searching and then personalizing your invitations might seem excessive, believe me that it will pay off in the long run.

And, of course, follow up with those who don't respond to drive the registration rate up.



Subject: Want to learn {{Topic}}?

Hi {{First_Name}},

I've seen your answers on Quora and noticed that you're interested in {{Topic}}. I'm hosting a webinar about this very topic on {{Date}}. Would you like to attend?

Best,
Phil

9.2 Engagement emails

It's no secret that only about 30-40% of people who signed up will actually show up. And that's fine too -- some of them will watch the recording that you send them after.

But there are ways that can help you get a full house.

Enter: the engagement emails.

Prepare a sequence of 2-3 emails that will aim at one thing, and one thing only: engaging the audience that's signed up before the webinar. This will increase the chance of them coming in when it's show time.

Ask them to send over questions they'd like to have answered during the webinar. Share a sneak peek of what they will learn.

Ask what struggles they have (related to the topic of your webinar) -- this one might even inspire your next webinar topic.



Subject: Any questions for {{Topic}} webinar?

Hey {{First_Name}},

I'm so glad you signed up for my upcoming webinar.

Are there any {{Topic}}-related questions that I should answer during the event? Feel free to share if anything comes up.

Best,

Phil

9.3 Follow-up after webinar

Attendees

With the people who showed up, ideally you'd like to move them down your webinar sales funnel and get them to, ultimately, sign up for a trial.

In the first follow-up:

- Send the link to the recording/slides (this is what they're waiting for the most) + answers to questions that were asked during the webinar
- You might offer additional value, such as free resources that are topically related to the webinar

In the second follow-up you:

- Deepen the relationship by sending over more in-depth content
- Try to invite them to try your product



Subject: {{Topic}} webinar resources

Hi {{First_Name}},

It was great interacting with all of you today. Here you can access the recording, and here are the slides.

As a bonus, here's a link to an ebook on {{Topic}} -- hope you'll find it useful! It covers {{Subtopic}} I've talked about.

Are there any other questions I can answer?

*Best,
Phil*

No-shows

No-shows need to be nurtured in a bit of a different way.

In the follow-up:

- Send the link to the recording
- Invite them to a private Q&A session



Subject: Want a {{Topic}} webinar recap?

Hey {{First_Name}},

I wish you could've made it to the webinar last week! We talked about {{Details}}.

Interested in seeing the webinar? No problem -- here's the link to the recording. If any questions come up, let me know. We can set up a quick call to discuss them.

*Best,
Phil*



Use email to collect customer feedback

10|Improve CX, retain customers & develop a product they'll love

Gathering customer feedback is a bottomless well of benefits for a SaaS.

You get to know your customers.

You can redefine your ICP over and over again.

You see how your customers really use your product (hint: might be not at all as you expect).

You see what features (or rather, outcome) they'd want to get next.

You get an idea of how you could prioritize your product development ideas.

You get pointers on how to improve the overall customer experience.

And if you close the feedback loop, you build their trust, increase engagement, turn them into brand advocates, and bump up retention.

Jackpot!

If you're not doing it yet, you should start asap, and make it an ongoing process in your company.

But don't stop at collecting the feedback and implementing changes or rolling out new features. Let the customers know that their opinion matters to you.

10.1 Customer feedback loop in SaaS

As a SaaS, you know that getting a customer is never a done deal. Even if you acquire more and more customers every month, there's still the issue of churn, the big ol' growth-killer.

But you might use the customer feedback loop as a way to keep the customers aboard for longer -- when you close the loop, the customer knows that they've been heard and that their opinion has a tangible impact on product development.

To close the loop, you need to be sure to gather feedback, act upon it, and let the customers know what role their feedback played in the changes you've implemented.

10.2 Getting the feedback & closing the loop

As Nichole (you might remember her from the customer onboarding chapter of this ebook) suggests, talk to your best customers to find out why they use your product, how they use it, and when.



Using that information to tweak the user flow to get your customers to their goals faster and easier is the raw material of retention. But I would go further. I recommend interviewing your best customers to find out what they'd really like to do, and how your product or app moves them closer to that goal. That goal that lives outside your product.

Nichole Elizabeth deMeré

In a way, this use case is similar to validating your business idea, only this time you're not trying to find out whether the idea that you've scribbled on a napkin will make sense in the market.

The first question you need to ask yourself is "what do I need their feedback for?". Is it to learn what they love and hate about your product? To test a new feature?

The types of questions you ask will obviously vary, depending on the reason.

I won't tell you what questions to ask exactly, but here's some advice on how to perform a customer interview:

- be specific (for more details I encourage you to revisit the # be specific segment of Chapter 1 of this ebook)
- don't believe compliments, unless they're backed by data
- ask open-ended questions
- dig deep & listen (don't jump in with another question as soon as the customer stops talking -- roll with the silence for a bit so they can talk more)

And here's what your email could look like:



Subject: Need your advice

Hey {{First_Name}},

It's been a while since we last talked. How are things going at {{Company}}?

There's a favor I'd like to ask you.

We pour our hearts and souls into developing a product you all will love and have the greatest results with. But the thing is, what we think you need not always matches with what you actually need.

So, to get a better grasp on what you guys need, I'm performing some customer interviews to see which things about our product you love, and which not so much -- and what you'd like to see in the future.

Could I send over some questions?

As a thank you for your help I could offer a {{Amount}}% discount on {{Feature}}.
What do you say?

Best,
Rob

See how Rob offered a discount? If you can, offer some incentive.

And after your product team has acted on the feedback you got, follow up with customers, telling them how their feedback impacted your product development plans.



Hi *{{First_Name}}*!

*A while ago you suggested we could add a *{{Feature}}* to our app. This feature has been on our roadmap for quite some time, but I'm now proud to announce that we've finally rolled it out!*

*Now you can easily *{{Feature_Description}}*. Isn't that awesome?*

*You can test it right now - log into your account and go to *{{Place_in_App}}*.*

Once again, thanks so much for your feedback! You're helping us develop a truly useful product that users love interacting with.

Feel free to shoot us a question if you have any.

Best,

Rob



Use email to get testimonials

11| Customer testimonials -- how do you get them?

You're probably familiar with the idea of social proof in marketing. You know -- you're thinking of buying a product, but are not quite sure if it's a good fit for you. So you decide to take a look at what others are saying to see if businesses similar to you have found it useful.

That's how powerful customer testimonials are.

11.1 Why do you need testimonials for your business?

- they build trust for your business by showing that your product actually helps people
- they serve as a way for customers to see that businesses similar to them get great value from what you offer
- they strengthen your brand and create a positive image for the company

Getting customer testimonials shouldn't be a one-time thing, but an ongoing process.



- keeping a personal touch

General emails without any personalization are usually dismissed these days. Try to remember -- when was the last time you replied to a one-size-fits-all message?

You'll increase the chances of getting a testimonial from a customer if you don't lose the personal touch.

- being direct

Be straightforward about your request, don't try to lure the customer in with a clickbait title. If they really get value from you, usually they'll be happy to share their experience.



Subject: Share your story?

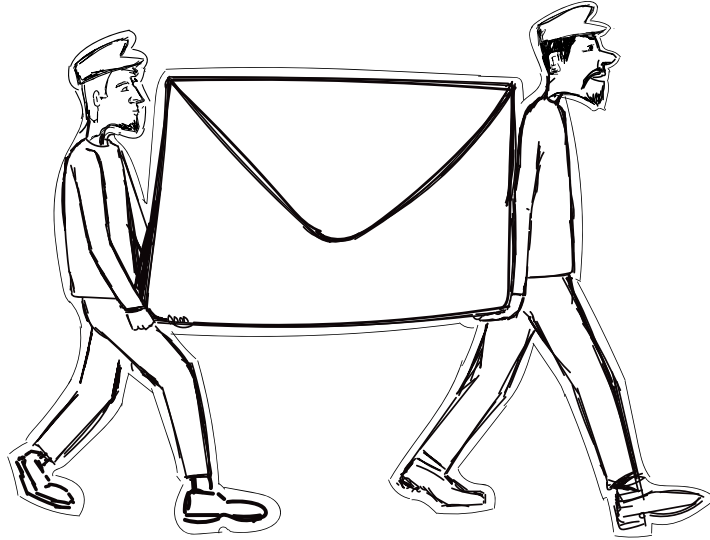
Hi *{{First_Name}}*,

*I noticed that you *{{Their_Milestone}}* last week - congrats! It's great that you've had so much progress with our tool. Hope the ball will keep on rolling :-)*

I'm reaching out because we'd like to share your success story in the form of a short testimonial on our website.

What do you say?

*Best,
Lucy*



Use email to find partners for your partner program

12|Fuel your partner base

Partner programs, if properly managed, can significantly increase your revenue.

So how do you keep bringing in new partners? Let's see.

12.1 Take a look at your IPP

Just like when defining your best target customers, you should determine what an ideal partner should be like for your business.

Below I've listed some basic IPP criteria that you can use as guidelines for creating your own.

A potential partner should:

- have an audience

The whole point of partnering with them is so they can recommend your product to other people and get commission of it, so it would be pointless if they didn't have an audience of any sort.

- have access to your target customers

Such a person is more likely to not only start, but keep using your product and get value from it, which equals they'll stay with you for the long run -- and bring value both to you and your partner.

- know your product or be willing to learn how it works

When they do know your product, they are better at choosing the right leads for your business and "sell" your product easier, as they know which angle to take when talking about it.

- be in the same industry as you -- this one's not necessary, but might be useful

12.2 Reaching out to potential partners

When you're writing a cold email to potential partners, mind these 3 things:

- focus on your prospective partner's needs
- show them why your product is easy to sell
- present benefits



Subject: Want to collaborate?

Hey *{{First_Name}}*,

*I came across your *{{Content}}* in which you review CRMs, and I decided to reach out and see if you'd be interested in joining our Partner Program. I think your audience would find our CRM valuable.*

*Here's more about our platform and Partner Program: *(link)*. We pay a *{{Number}}*% commission.*

Let me know if you're interested.

*Best,
Patrick*

Follow-up:



Hi {{First_Name}},

I believe our CRM platform would fit perfectly into {{Content}} that you create.

Would you be interested in joining our Partner Program? For every new customer that you bring, we offer a {{Number}}% commission (on every month of subscription).

Does this sound interesting?

Best,

Patrick



Use email to scale your PR

13|Handle your PR

If your budget is too tight to hire a PR agency -- or you don't want to do it -- there's a way to scale your PR on your own.

You can contact journalists to pitch your content or press releases in a scalable, yet personalized way.

13.1 How to pitch to journalists to get coverage?

- 1. First of all, what you're pitching has to be up-to-date, interesting, and relevant to the target audience.**
- 2. As to your email, get straight to the point. No build-up is necessary. Journalists get dozens of these pitches every day, so keep it as short as possible.**

- subject line: compelling & personalized to the journalist or publication

Go over the journalist's headlines and see how they structure them -- and compose your subject line in a similar way. It should be a one-line summary of your article (or whatever it is that you're pitching).

- make sure you've provided everything they need for the coverage in one email -- your goal should be to get a reply that they've already covered the story

Start your outreach email with a short and concise summary of what you're pitching.

And add everything they might need:

- Links to your sources
- Links to folders with images
- Quotes from experts on the topic, etc.

Make it clear which link you'd like them to use if they cover what you're pitching (on a side note -- you'll also get a backlink for your website).

3. Personalize your emails. Tell them you liked their latest article. Or a publication they posted on social media.

But do it only if that's true. People can sense dishonesty.

If you personalize the emails, they'll see that since it's been tailored specifically to them, you're not just sending one email to all, hoping someone will agree to pick it.

With such a personal approach, you'll not only get this one particular story covered -- you boost your chances of getting more of your stories covered in the future as well.

4. Check your emails.

Your pitch needs to be well-structured and error-free. Check if the links work and if they lead where they're supposed to.

Make sure it's easy to read.



Subject: 2020 Trends in Parenting: from Self Care to Hands-on Education

Hi {{First_Name}},

Loved your Facebook post about {{Snippet_1}} last week. So funny! And very true, especially {{Snippet_2}}.

I have a piece you might like: we've consulted industry experts {{Snippet_3}} and {{Snippet_4}} to learn what the parenting trends in 2021 will be (it's a list of 10).

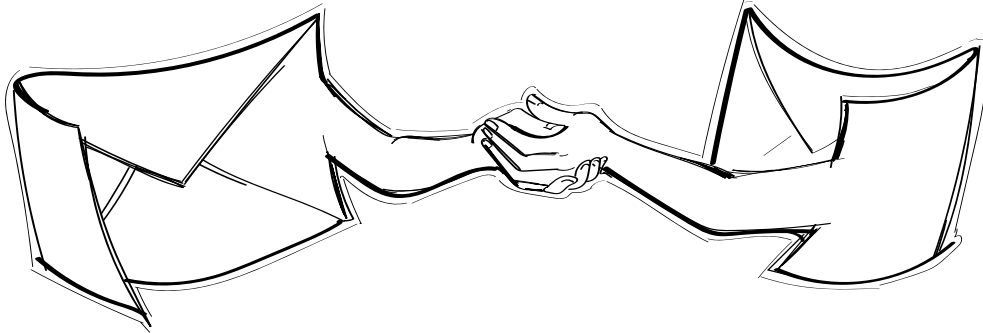
(link to the article)

A quick sneak peek of what those trends are:

(list of trends from your article)

Would be glad to help with anything else!

Best,
Rebecca



Use email to network

14|The power of networking emails

In a busy business world it's hard to get through. And face-to-face meet-ups are great, but people still might have a hard time remembering all the people they've met at a conference or industry event.

Can email help you with your networking efforts?

Why yes, it surely can.

You can use email to start a conversation before you meet them, and follow-up after you did.

14.1 Reach out before the event

If you break the ice a week before the event, it's going to be easier for you to start a conversation when you actually meet -- you'll have a "way in".

Here's an example of email that you could send before you meet:



Subject: Let's meet at {{Event}}

Hi,

I saw you're attending {{Event}} next week as well.

Just so I don't end up a wallflower, I decided to look up other attendees to see who's going to be there. I've been reading about {{Their_Company}} and {{Snippet_1}}. I'd love to talk about that at {{Event}}.

See you soon!

Jack

At this point, you're not selling anything. You're starting a conversation (which is what a cold email is supposed to do).

When you actually meet with the person, start the conversation to open them up a bit. Ask what they have been reading lately, which part of the event they liked the most so far, or where they'd recommend you to go while you're in the city. Spark an authentic networking conversation.

14.2 Reach out after the event

This one's more traditional -- you say you really enjoyed meeting them, maybe mention a thing or two that came up during your conversation. Since you've already met (so the lead is warmed up), it might actually work.

But be sure to add a clear CTA to keep the conversation going.



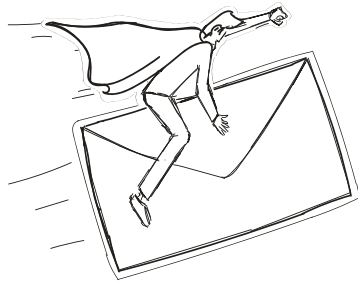
Subject: Great talking to you at {{Event}}

Hey {{First_Name}},

It was great meeting you at {{Event}}. I enjoyed our conversation about {{Snippet_1}} -- and by the way, I finally remembered {{Snippet_3}}.

Anyway, I kept going back to our conversation in my mind so I went to your website and I saw that {{Snippet_4}}. I think I might know the solution to this. Shoot me a line if you need any help.

*Best,
Jack*



Want to test it in practice?

GET FREE TRIAL

Happy emailing!

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