

Using Sherpa for CRM and Prospect Email Sequences

How Emailmovers uses Sherpa to generate leads

What is Sherpa?

Sherpa is an email outreach tool designed to send personalised cold emails from your email account with automated follow-ups. Sending to smaller lists of targeted contacts not only allows you to be highly relevant with your content, but it also helps aid better email delivery results.

Sherpa's email builder helps your email become highly personalised with various merge tags and time of the day merge tags available.

Once your email copy and sequence is design you can the perfect delivery formula by scheduling email delivery times with timed follow ups that encourage positive engagement.

Your replies are then organized automatically by filtering bounces, auto-replies and sending you alerts as and when a response is received. You can check replies either within Sherpa or within your inbox directly.

1. UTILISING SHERPA FOR CRM MANAGEMENT:

Emailmovers uses Sherpa to re-engage with cold leads and opportunities that have gone dormant in our CRM system. We identified two main categories for re-engagement on a monthly basis:

1

Uncontactable Leads:

Contacts who had become unresponsive despite previous attempts at communication.

2

Clients who Backed Out

Leads who had initially expressed interest but didn't proceed with an order.

OVERVIEW

In today's competitive business landscape, maintaining strong relationships with prospects and re-engaging with lost leads can significantly impact sales success. We (Emailmovers) have personally faced the challenge of effectively managing our customer relationship management (CRM) system and generating new leads through personalised email outreach. To address these challenges, Emailmovers adopted Sherpa.

CHALLENGES

1. CRM Management:

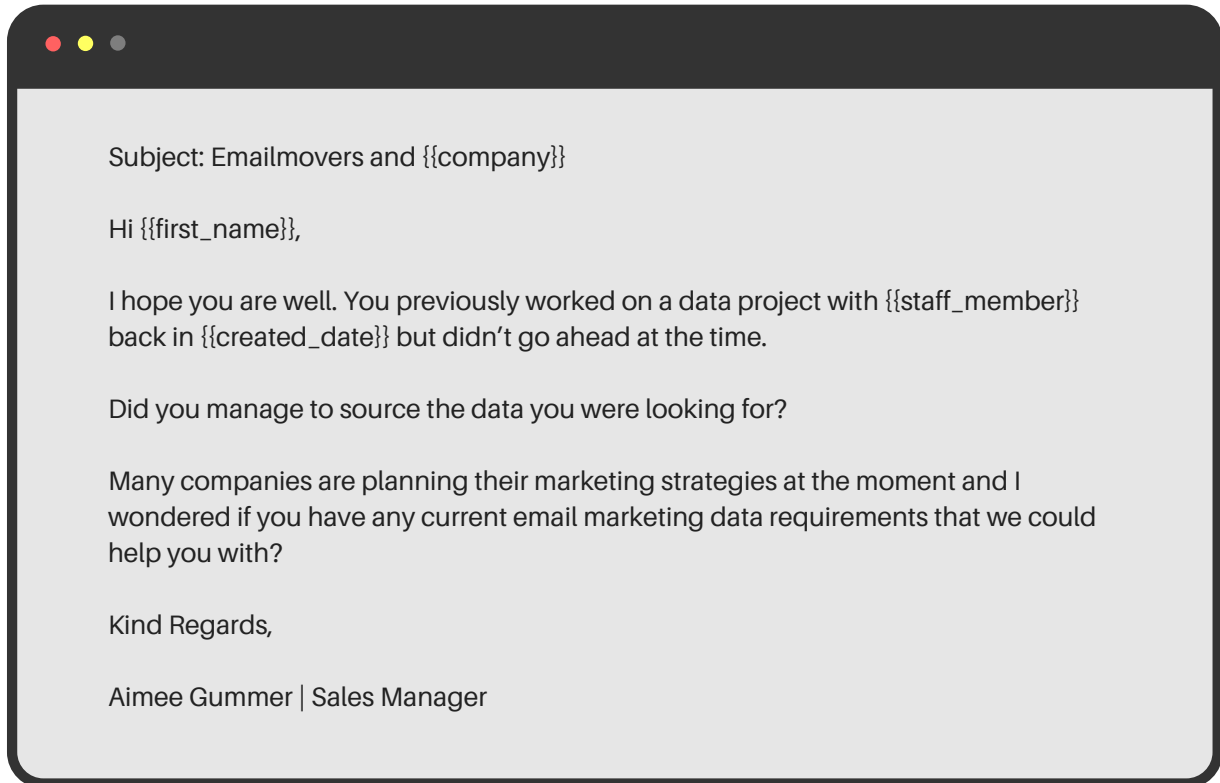
We needed a solution to re-engage with cold leads and lost opportunities stored in our CRM system.

2. Lead Generation:

We aimed to generate new leads through targeted email campaigns based on industry trends and specific business needs.

Email Sequences:

We created personalised email sequences tailored to each category of leads. These sequences are automated using Sherpa's features, scheduling follow-up emails at strategic intervals. The emails are highly personalised, referencing previous interactions and highlighting potential opportunities for collaboration. An example of one of the emails:



Personalisation

The following fields are pre-populated for better response:

{{company}} - Company Name

{{first_name}} - First Name of Contact

{{staff_member}} - The Account Manager they worked with

{{created_date}} - Date the enquiry first came into the company

This email is sent to the contact 1 month after the opportunity is closed. Then 2 more emails are scheduled to follow up the first email, each with a 4 day delay if the contact does not respond.

These can be set up to use the same subject line which will appear in the same thread as the previous step and you can set the amount of days to delay.

We choose to schedule our email in working hours only, so Monday - Friday - 9am-5pm.

Results:

- **Average 11% Reply Rate:** Reaching out to Uncontactable and Backed out leads resulted in an impressive 11% reply rate, providing valuable feedback to both the sales and marketing teams.
- **Average 4% Positive Reply Rate:** Emailmovers received positive replies from 4% of the contacts, indicating renewed interest and new opportunities for the Sales Team.

2. LEAD GENERATION THROUGH TARGETED CAMPAIGNS:

Emailmovers identifies trends and specific business needs to create monthly targeted email campaigns aimed at generating new leads. We utilise Sherpa alongside our B2B marketing database in Counrunner for this purpose.

Campaign Examples:

1 Industry-Based Campaigns:

By analysing industry-specific trends, we identify potential leads and craft personalised email campaigns tailored to their needs.

Firstly we analyse the leads coming in to see if there are any specific industries that are enquiring more than others. Using this information we then use our Counrunner platform to access our database to find similar companies, usually looking at their registered SIC codes.

We then upload these similar contacts to Sherpa and create a campaign targeting them. To write the email content we would analyse what these types of companies have been enquiring for and use this information within the email. The more personalised the message, the more likely the recipient will respond. By adding information about data that we know other companies in the industry are looking for at the moment, we increase our chances of a response.

2 Seasonal Campaigns:

Recognising seasonal opportunities - For example planning for Christmas events, we targeted businesses in the hospitality sector with tailored email offers.

The second way we create campaigns is by thinking about what kinds of companies would be looking for specific email data campaigns. For example in August we had the idea that large company offices would be looking in the next few months to plan and book their Christmas staff nights.

Therefore, we used Counrunner to create and list of restaurant, bars and hospitality contacts. The copy we constructed explained that we could offer them an email list of large companies within X miles of them for them, to market their Christmas packages to. Another personalisation we used in this campaign was to include their location in the copy, meaning we could mention we have contacts within 10 miles of {{insert location}}. This increased the relevance and our chance of a response.

Results:

- **Up to 25 New Leads Generated Monthly:** By strategically targeting potential clients based on industry trends and business needs, Emailmovers generate new leads each month for the Sales Team.

Conclusion

Through the strategic use of Sherpa for CRM management and targeted email campaigns, Emailmovers effectively re-engage with dormant leads, generate new opportunities and achieve notable success in lead generation.

By personalising our outreach efforts and leveraging insights from our CRM data, Emailmovers demonstrates the power of utilising technology to drive sales growth and strengthen customer relationships.