Humanize Your Automation

Our company (Geek) depends on automation for 80% of our results. We're big fans of automation, whether its online payment providers, autoresponder emails, or any one of a dozen other software systems we use.

But is there a limit to how much automation is a good idea? For example, I (Mike) am celebrating my 35th wedding anniversary this year. Do you think an autoresponder email to my wife on our anniversary would be a romantic idea? Maybe I could teach Alexa to say “I love you sweetheart” in my place? Buy a robot to give her a hug?

You get the point: there are things that automation does well, and things it fails at spectacularly.

As we reviewed the thousands of responses to quote requests in The Secret Shopper Project, we noted that some property management companies are using automation in a way that makes them come across as impersonal and non-human. We don’t think anyone intends this, but it’s still the vibe we got from many follow up campaigns.

Just like my wife doesn’t want an anniversary autoresponder email, a prospect doesn’t want to feel like they are a ‘number’. Humans do business with people they know, like and trust. People trust people, not an online robot (which is essentially what software of all kinds are, online robots). And this directly impacts close rates since can we agree that if your prospect doesn’t trust you, you probably aren’t getting them to sign a management agreement.

This chapter is our attempt to help you find that ‘sweet spot’, the middle ground where you can use automation without making your prospect feel like they are being hugged by a robot.

**Things We’d Test To Humanize Your Automation:**

- Try a Fibonacci Sequence for Follow Up
Try a Fibonacci Sequence for Follow Up

One of the surest ways to come across like a robot (or a creepy stalker) is to set your autoresponder to ‘blast’ and send 10 autoresponder follow up emails in 10 days. We get this feedback regularly: “Hey, I followed up 10 times in 7 days by email and I’m getting no response.” Well, maybe that prospect tuned you out once they figured out you have them on a follow up sequence that feels impersonal? Admit it, don’t you delete a lot of the autoresponder emails you get? Like most of them? Your prospect is just behaving like you do (and most other humans).

So what is ‘just right’ in terms of follow up frequency for property management leads? How about following a pattern that occurs in the natural world: the Fibonacci sequence? The Fibonacci sequence is a series of numbers where a number is the addition of the last two numbers, starting with 0, and 1. The Fibonacci Sequence is: 0, 1, 1, 2, 3, 5, 8, 13, 21, 34, 55... since 0 + 1 =1, 1+1 =2, 1+2=3, 3+5=8 and so on.

Fibonacci sequences are found regularly in nature. Example: the number of petals on a flower many times conforms to a Fibonacci sequence. The direction and placement of leaves on a branch or the curling and curving nature of a sea shell is a Fibonacci sequence at work. When the weather person on TV shows you a storm front on screen, the shape of that storm is a Fibonacci pattern. And did you know that the shape of a human face has Fibonacci patterns in it?

Do we think there may be something ‘magic’ about Fibonacci sequences given how often they are used in nature? God playing with numbers? Maybe. So why not apply this sequence to property management follow up?

How would this apply to follow up? When you receive a quote request, that is ‘Day 0’. We would test 3 follow ups on Day 0: one text, one email, one call.
Then we'd add 1 to Day 0, which gives us Day 1 (Day 0 is when you got the quote request, Day 1 is 24 hours later), and on Day 1 make two follow ups.

Add 1 to that and you have Day 2 (now 48 hrs since quote request): we'd make one follow up attempt that day.

Day 3 (72 hrs since quote request) we'd make another follow up attempt.

Day 5 we'd follow up again and then once more on Day 8.

That would give us 9 follow up attempts in 8 days. 3 of those attempts would be on Day 0, 2 of them would be on Day 1, and then one on each of the other days. This front loads the follow up close to when the quote request was made and when we assume the interest is the highest. We'd strongly recommend that you use different modes (text, email, phone) and times of day which allows you to lessen the potential electronic ‘stalker vibe’ while not reducing your follow up quantity.

You will also note that as time passes, the follow up spreads out more (Day 13, Day 21, Day 34). This makes sense doesn't it? The prospect hasn't responded to a fairly intense follow up sequence, so it's probably time to back off a little and give them some space to breathe.

We would also use the more ‘personal’ form of follow up (texting) early in the process and if you're not successful in making contact, ease off that and use more email and phone as time passes since the prospect is telling you by their actions that they are slow walking this process, so you want to match their level of personal intensity or risk having them bolt on you. In our example below, we suggest a total of 5 emails, 5 calls, and 3 texts in 55 days.

Here's the Fibonacci sequence in table form with some sample ideas of modes of follow up

| Day 0    | 3 follow up attempts (text, email, phone) |
| Day 1    | 2 follow up attempts (email & phone call at different time than Day 0) |
| Day 2    | 1 follow up attempt (text) |
| Day 3    | 1 follow up attempt (email) |
| Day 5    | 1 follow up attempt (call) |
| Day 8    | 1 follow up attempt (email) |
| Day 13   | 1 follow up attempt (call) |
| Day 21   | 1 follow up attempt (text) |
| Day 34   | 1 follow up attempt (email) |
| Day 55   | 1 follow up attempt (call) |
Did this Fibonacci sequence come down from heaven? Maybe. But even if you don’t think so, nature laid it out for us so nicely, we think it’s at least worth a test!

**Follow Up Differently ‘Workday’ vs. ‘After Hours’**

It’s not too controversial to say that the more personal your follow up is, the better the results you’re likely to get. The reason is simple: all humans like being treated like the unique person they are versus feeling like they are a cog in a follow up machine.

For example, most of us would likely respond best to a custom created email that precisely hit our needs, a personal call or text, maybe a video made just for us. Of course being personal does present some issues: customized personal responses take time.

What is all this talk about personalization doing in a chapter on automation? Because we think personalization should be the default and automation should only be brought in when it’s the most effective option (IE when personalization is not feasible). But companies often get stuck in a “all or nothing” mentality when it comes to automation. They either have to do it all automated or all by hand. When you think of it like this, then the moment that you find a situation where automation would work better than manual, you move the entire process away from personalization.

But we think there is a better way, a more nuanced approach. Begin by breaking your sales process into different buckets: one bucket where automation is the best option and one bucket where a more personalized, hands on  approach is more effective. The first and most important distinction we can make to determine which bucket something belongs in? When your offices are open and when they’re closed.

Using an ‘office open/office closed’ distinction makes it fairly easy to decide how to approach things. When you’re open, you reply with personalized responses (using automation in a way that speeds up that process, as we’ll suggest later in this section). When you’re closed and personalization isn’t practical, you rely more on automation (we recommend some ways to even make this after hours automation ‘feel’ more personal in the chapter titled ‘Sell Online 24/7’).

Let’s start by looking at follow up during the workday.

**Email Follow Up During Work Hours**

Let’s deal with the “Nice ideas, but we don’t have time to be personal during the day” concerns upfront. We’re focused on the objections offered by salespeople for not having
time at work to personalize new incoming lead responses during business hours: 9-5pm Monday to Friday.

Our business at Geek is to provide valid owner leads to property management companies. On the low end we have customers who only want 5 leads per month and on the high end we have clients who buy 80 leads per month or more: the average client buys 10-20 leads per month. Let’s imagine a higher end example in which a company receives 20 leads per month from us and 20 from another source (website, referrals, etc) for a total of 40 new owner leads per month. Let’s further assume that we have 20 working days per month which means on average a BDM/salesperson would get approximately 2 new leads per day to handle.

We believe that in less than 10 minutes you can personalize your follow up to a new owner prospect in a way that knocks their socks off. So that’s about 20 minutes per day that is being spent personalizing the follow up. We assume the average BDM/sales person works an 8 hour day. Which means that if they did the personalization we recommend, they still have 7 hours and 40 minutes every day to do other things. So we ask: is spending another 10 minutes per lead personalizing them really that much of an overwhelming burden?

We'd further suggest this: if taking care of ‘new business’ in the best way possible is not one of the top priorities of any BDM/salesperson, we'd like to know what is? For now, we're going to assume that every BDM/salesperson has an extra 20 minutes a day to do what we are going to suggest in what follows.

We believe property management companies will get higher close rates if they will add more authentic personalization to the first prospect emails they send out during work hours. We'd aim to personalize three aspects of the first email: subject line, personalized video above the fold, and first 2-3 sentences above the fold. We'll give you more ideas about ways we'd recommend doing this personalization later in this chapter

**Email Follow Up After Work Hours**

Personalization of ‘first emails’ becomes tough once everyone goes home for work. Of course you could hire someone to respond to after hour quote requests in a personal fashion, but we won’t spend time discussing that option since we think few will try and honestly we’re not sure the math will work on it (IE you might lose money trying it).

Most companies that follow up on leads outside of normal business hours rely on autoresponders: here’s how we'd use autoresponders in a way we think might be perceived as ‘more human’. 
This test does require you to do the work to create a ‘perfect sales presentation’ as we suggested in the ‘Sell 24/7’ chapter.

We would test making your first follow up email (an autoresponder) a quick ‘semi-personal’ email that is triggered once a prospect fills out and submits a quote request online (semi personal would be an email that isn’t created custom by a human but that conforms to suggestions for personalizing automation in this chapter). That email will suggest a prospect click on the link you provided in the email which would go to a webpage that would have your ‘perfect sales presentation’ on it. This will also work for incoming calls after hours if you follow our suggestion and hire an answering service for after hours calls: the service can gather the information and direct the caller to the same webpage.

We explain the logic of the perfect sales presentation on a thank you page in the ‘Sell 24/7’ chapter. The overall point is to let the prospect make progress in solving their problem on their own while they wait for you to get back to them when you’re next open for business. So the information has to be really helpful or you will defeat the purpose.

But if it is in fact very helpful information that allows them to make progress on the problem they came to you to solve, then we believe you will get ‘credit’ for excellent follow up (see the ‘Sell 24/7’ chapter for more on this). We think this is better than what companies are currently doing with after hours leads and also doesn't require hiring staff to cover after hours leads.

**Where Is Personalization Worth the Effort?**

Automation is about smart leverage. Smart leverage is taking low value tasks and making a computer do them so you can focus your human energy on higher value tasks. But you need to know which are the high value human tasks and which are lower value and can therefore be dumped off to a computer.

We think email personalization is a high value human task. For example we can all tell when a “robot” personalizes an email to us can’t we? When we get that email with our first name in it, we know that someone didn’t type our name personally at the beginning of the sentence. But we also know that when we get an email that references personal information or something more complex than the average computer can do, we know there is the scent of human touch on that email. We all like that human touch, every one of us.

But needing to add a personal touch doesn't mean we need to write every email from scratch. In fact, that's usually not the most effective way to personalize things since on the
fly, human beings can forget information that might be critical (and feel personal) to a prospect. It's better to know what should stay the same and what should be different each email. Put another way, if personalization is a high value task overall, so is determining which elements in that email need to be personalized and which don't.

Here's how we'd sort out what does and doesn't need to be personalized in each email. For parts where the content tends to be the same each time (detailing which services you offer for instance or discussing pricing), craft a killer response that you'll keep the same each time. You do the in depth thinking one time and leverage that response over and over. But that doesn't take care of personalizing to grab the prospect's attention or making them feel like there is a human who is listening on the other end. For this, we suggest testing out a variety of templates to see which ones work in what situations.

For instance, you might try 5 different headline varieties and find the one that works the best. You fill in the template and personalize as needed. Or maybe you narrow it down to 3 different templates, which you choose based on your intuition in the situation. Personalization doesn't have to even involve writing something new... it can involve choosing the right template based on the customer’s response.

So where do we think you should be focusing your personalization efforts and building up your toolkit of templates to work from? We think there are 3 key areas:

1. Subject line
2. Introduce yourself video
3. First paragraph

Let’s give some ideas on how to personalize these things to give you some directions to go when you’re crafting yours.

**Personalized Subject Line**

We believe best practices (during business hours) would be to create a personal (and therefore attention grabbing) subject line to every first email that a prospective customer receives. There are many options here that could work and you’ll have to test which works best for your business, but here are a couple examples to get the creative juices flowing.

You could use their phone number in the subject line. Something like: “Hi Frank: is 425-776-9083 the best number to reach you at?” Could you resist opening an email with your phone number in the subject line? We couldn’t.

You could also use their address and put in something personalized about their property. For example, “Suzy, does your home at 456 Main Street have a basement in it?”. Anything
in the subject line that screams “hey, this is personal information and likely not a robot emailing me” is good for the subject line and we think any sort of detailed question about the property does this well.

You could try other subject lines like “I made a personalized video for you Bob” or “Sally, here is your quote” and that ‘might’ work, but we’re a little skeptical those types of subject lines will get great results. Doesn’t it kind of feel sale-sy, just a bit? Just enough tie into other emails they may have received from others to make a person think “Hmm, I know it seems personalized, but robots have tricked me by putting my first name in the subject line before. I won’t get fooled again.” We’re not saying to not put their first name in the subject line, the data says that bumps response. We’re just suggesting that personalizing with just the first name without adding other personal info in the subject line might not work as well as you might wish.

If you want to get fancier (and you should) then test which subject lines get the best response. Try different ones and measure the open rate for starters. Most email providers allow you to get that kind of response data.

**Introduce Yourself Video**

Beyond a personalized subject line, we also believe that every first email should have a personalized “introduce yourself” video addressed to the prospect that makes it clear who will be helping them. And by personalized we don’t mean a canned company video, we mean truly personalized, fresh-from-the-oven-that-day video. You can easily make these custom videos using vendors like BombBomb, Vidyard, or Drift.

Here’s the level of personalization we’d be aiming for with ‘introduce yourself’ videos. If Bob requested a quote, the BDM should have Bob’s name written on a mini whiteboard in that email so Bob can see his name when he looks at that email and sees the video thumbnail in the email. Do you think Bob will be able to resist watching a video that he KNOWS is personalized for him? We doubt it. (we'll put the links to the video vendors and the whiteboard we purchased from Amazon in the Appendix).

This video doesn’t need to be a full length feature film: a short 1-2 minute video is more than fine. Some reading this will be immediately nervous that they will need to sound eloquent or funny or whatever, but that is not necessary (and may not be helpful actually). Your main goal should be to build trust by coming across as what you are: an authentic human being. Sadly, just being an authentic human in current marketing is a big point of differentiation!
What do you say? Just be yourself, talk like you’d talk with someone face to face. The more human and natural, even with flub ups (within reason), the better. Since this is your first interaction with the prospect, focus on what is immediately on their mind. Introduce yourself (Hi Bob, my name is Marcie, I’ll be the person helping you with the quote you asked for.”) After that, then maybe ask one or two specific questions you might have (IE “Bob, I was working on your quote and was curious about the overall square footage of your home and if any updates have been made? That would help me give you a more accurate quote.”). We’d also possibly say something about next steps so they are clear (“Bob, I’m going to be giving you a call today and if I don’t reach you, I won’t leave a message but I’ll call again tomorrow. I will also text you and if a call today is not convenient, you can text me back and give me a good time for me to get in touch with you. Talk with you soon!”).

**Personalized First Paragraph**

The final personalization we’d do is a few first lines of text above the fold (what you see without scrolling is called ‘above the fold’ ) that scream ‘I wrote this just for you’. Don’t be phony or you’d undo all your hard work (we saw some companies say “I was thinking about you today” which comes across as uber insincere unless you can back it up with something more personal like “I was thinking today about other homes I’ve rented in the Brierpark neighborhood where your home is….”).

‘Above the fold’ is simply another way of saying the first few sentences a prospect reads in email before they need to scroll. What you are aiming for here is something that will sound both human and encourages them to watch your video. For example “Hey Bob, Marcie here. I’m the person who will be getting you that quote for property management services you asked for. I have a question about your home at 123 Main Street and I made a quick 2 minute video to explain what I’m wondering about.”

Nothing whiz bang about that sentence of course; the point is simply to make a human connection, encourage them to watch the video (since some will ignore thinking its too long, so you do want to mention its a quick video). The goal here is for them to watch you on the video so they get to connect with you as a human being. That can’t happen if they don’t watch the video.

If you find that your videos are not getting watched (your video provider will have that data) then test different above the fold lead in text to see if you can get more folks watching.
Customize Your Automation

We saw plenty of what we call the ‘catch all’ email in The Secret Shopper Project. A ‘catch all’ email is an email that is meant to be generic enough to suit every need a prospect might have. This inevitably leads to an email that addresses all possible situations, but addresses none of them very well. The prospect has to go hunting through your email to find the answer to the question they explicitly asked, working through answers to questions they don’t care about. But automation requires this, doesn’t it?

We don’t think it has to. While we recommend hand-crafted emails whenever possible, even implementing some sort of automation based on past prospect behavior can help improve how personalized your emails feel, even if no human touched that email after it was created as a template.

For example, many property management company owners have multiple actions a prospect can take on their website, such as requesting a rental analysis or a quote. These prospects are telling you something about what they want and where they are at in the process by these actions... they are different people thinking about different things. Are you treating them differently? We think you should be.

Different actions on the part of a prospect on your website for example should trigger different Leadsimple (or other CRM) sequences that send out different types of automated emails that scratch the particular itch that prospect seems to have. So if they request a rental analysis, then the emails they receive should address their interest in determining what their home might rent for (instead of a ‘general welcome’ email which is the norm). If a prospect requests a quote, they are asking for something different from you than a person who requests a rental analysis is, right? So give that person information about pricing since that is where that person's head is. If you do, it will feel like you are listening and that will feel more personal, even if every email is part of an autoresponder sequence, untouched by human hands!

The point is, whenever possible, try to create automated email systems that use the previous behavior of the prospect to trigger a more customized email response from you. Even if a human never touches that email, to the prospect it will ‘feel’ more personal if it's a closer match to what they are interested in.

Use Automation as Your Assistant Not Your Salesperson

Elon Musk seems to think that eventually most of us will be in self-driving cars; he'll have to pry our cold dead hands off our steering wheels before that ever occurs for the Geeks. Are we happy to have a car that tells us when it's almost out of gas? Do we like cruise
control? Are we intrigued by cars that start and heat themselves remotely, or back into parking spots on their own? Yes, yes, and yes. Our point? We think some marriage of humans plus artificial intelligence is a winning combination.

We see this same ‘conversation’ happening in the property management automation world. We saw many in The Secret Shopper Project who seemed to believe that if they could just craft the right automated sales sequence, they wouldn’t have to interact with the prospect until they were absolutely ready to buy. An automated salesperson. The dream is to create a “sales machine” that can crank out closed deals like widgets from a factory. Call us extremely skeptical about the ultimate effectiveness of this mentality. It likely actually hurts the sales process (and close rates) in fact due to the need for human touch and personalization that builds trust. Real fog-a-mirror humans may not be needed to sell hair brushes or shaving cream, but property management sales aren’t that. Not even close.

We think the more appropriate seat on the bus for automation to sit is as the salesperson’s “personal assistant”. An assistant takes tasks that are not your core competencies off your plate, ensuring that your time and energy is freed up to focus on the more important aspects of your job.

What kind of tasks might an automated assistant handle for you? Think of things that help you do your important tasks better or get tasks as close to the finish as possible without removing that crucial final human touch step.

For instance, given that responding to a lead quickly in a personalized fashion is so important, how could you use automation to make sure that you always were quick to respond, but it didn’t disrupt your work for 20 minutes every time a prospect reached out? Here are a handful of ideas to get you started:

**Have a “Red Alert” Go Off When Leads Come In**

What we mean by this is to set up your notifications in a way that lets you know there is something important to take care of. You could have your sales tool contact you in a variety of ways... maybe it’s even all possible methods (Email/Phone/Texting, and maybe even push notifications on your computer). If you have lots of notifications, have a special ringtone or alert sound for new leads so it doesn’t get mixed up with things like spam calls, texts from tenants, etc. Just make sure that whenever a new lead comes in, your “assistant” lets you know immediately to take care of it.
Make It Easy and Frictionless to Respond Quickly

We do advocate for personalization when reaching out to leads, but that doesn’t mean that you need to craft each response from scratch every time. Canned responses, which are just templates for emails that you’ll write over and over, can save lots of time here. Maybe there are 3 different common responses you give to prospects depending on their situation… just put these in as canned responses.

For bonus credit, if you use personalization to add things like property address or their name, see if there is a way your tool can automatically add those in for you. Then all you have to do is review, maybe add a quick sentence or two and hit send.

Make Sure Your Strategy Works On All Devices

It’s all well and good if you have a system that works on your laptop, but you absolutely need something that works on your phone as well for the times when you’re not by your laptop during office hours. If you get your red alert, but you can’t take advantage of your canned replies, this is when you’ll be tempted to skip the well crafted template you created and give a quick, “what can I help you with?” reply (and for the record, we are not fans of “what can I help you with?” replies).

If you have a sales tool like Leadsimple or Hubspot, this is likely already handled. Either have the mobile app installed or the link to the app for your browser saved to your homescreen. If you don’t use a sales tool like that, you’ll have to get a little more creative, but there are plenty of options (for example, using Zapier to create a draft of your template that you can edit or having drafts pre-saved in your gmail).

Ditch Automation that Erodes Trust

You know what’s worse than doing nothing at all? Doing something that makes things worse. We understand that many use automation with good intentions; you are trying to respond quickly, give prospects a sense that you have received their message and to save yourself some time. But sometimes that good intent backfires.

We saw this happen in a variety of ways when looking at some of the emails we received during our Secret Shopper Project research. Many automated emails we received either confused us, wasted our time and or generally made us trust the sender LESS. Doing nothing would have been a better solution.

Many times these decisions aren’t conscious ones. Your form tool may have had a confirmation email setup right out of the box and maybe you didn’t know how to fix it at the time. Or you had someone build you a website and set up the form in a way that was
supposed to be for every possible type of query, that responded automatically with a response that needed to address renters, owners and vendors all in one. We're not trying to blame anyone here; things happen.

Go to your website and fill out the contact form that most people are going to use. What email do you receive? Read the automated emails you receive from the perspective of the prospect. Does this help achieve other principles discussed in this book, like building trust, being relevant, etc.? Does the email clearly connect with the information they requested from you? If the answer to these questions is no, remove it. Doing nothing is better than something that makes things worse.