“Customer Status bot” Method™

By Lincoln Murphy

We’re in 2023… Does this stuff still work?
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About Lincoln Murphy

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We’re in 2026… Does this stuff still work?

Yes.

Why?

Because it isn’t overused (yet).

Why isn’t it overused yet?

First, anything to do with customer engagement isn’t overused. It just isn’t. And that’s kind of sad.

But in other ways it isn’t sad because it means you get to use tactics like this and reap the sweet, sweet rewards.

Something like cold outreach email to “generate leads” is so played out in many markets because it was easy and cheap to get a bunch of emails and spam people that to make it work, you have to be super-clever… and even then, returns on this type of activity are diminishing quickly.

But this “Customer Status Bot” method - while sharing many of the characteristics of the cold email outreach movement - has a couple of things going for it that will keep it from being played out, at least for a while.

First, you’re not sending to cold prospects; the recipient of the messages you send via this method have already interacted with you (or your software, lead gen system, etc.) in order for the “Customer Status bot” (or whatever) to have contacted you in the first place.

Second, it’s not so easy to implement this system, even if you don’t do it 100% correctly. If you’re going to go through the trouble of doing some of what I talk about, the emails you send are likely going to resonate due to proper timing, context, etc.

Unlike cold email outreach, where you get a list of emails and a way to email them and you’re in business, this takes some effort. So while this method, like anything good, will likely lose its effectiveness at some point… right now, it’s still going strong.

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The Rise of the Personal Follow-up Email

The trend around sending a “personal” email from the founder or CEO, a salesperson, a customer success rep, etc. after someone signs-up for your app really exploded in 2013, the year I originally came up with this method (almost 10 years ago… yikes!)

The reason this became a trend is because, more than anything, it tended to work really well. It would often start a conversation, get people engaged, and was great as a customer development tool.

But over time, two things have happened:

1. The people receiving the messages - especially if you’re selling to a “tech savvy” bunch - realize these are automatically generated so the “old way” of just sending a template message immediately after sign-up isn’t working like it used to

2. The people and companies that are having massive success with this technique are the ones that have evolved - and will continue to evolve - the method over time.

What I’m showing you here - the “Customer Status Bot” method - is a variation of this sales outreach technique that I’ve used both in my business and with hundreds of clients around the world in disparate markets with massive success.

What does “massive success” mean? Well, it’s all about starting a conversation, and mine was **SO** successful I had to turn it off until I could build some additional logic (geolocation, social profile integration, time of day, etc.) in because it created far too many conversations for me to handle!

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But for my clients, at the low-end, 50% engagement (that is, 1 out of every 2 people that receive this email reply back and start a conversation) is easy to achieve, and I’ve seen “engagement” rates as high as 90% after continual refinement.

Some do even better...



So if you’re already - or considering - doing “personal outreach” messages, this could be just the thing you need to skyrocket your results.

The Fall of the Personal Follow-up Email

Back in the old days we would immediately trigger a response to the prospect that signed-up for our Free Trial, subscribed to our app, joined our mailing list, or whatever. This proved to be not so great.

Aside from the fact that we would send a “personal” message at 3AM, the sheer speed with which we reached out was often a dead giveaway that this was automated.

When you include the indicators of an unsigned email from a third-party system, this just smacks of a fake personal email. Quite off-putting.

You’re teaching your customer to ignore you… from day 0.

So then we played with delays... 17 minutes, 1 hour, 1 day... but even though it was better than instantly sending them a message, the standard “I saw you signed-up... welcome!” message wasn’t cutting it anymore. People were wising up to this gimmick.

But there’s more to it.

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Aside from the problems with authenticity, there’s something going on with these messages - especially when sent from an executive like the CEO - that could be sending the wrong message...

...it looks like you’re just waiting around for people to sign-up!

Seriously, it looks like you're just sitting there watching your dashboard and when a new prospect pops up, you fire off an email.

You see, the typical workflow included a stop - start process that made it appear as if we were waiting for a sign-up and then - when it occurred - we would take a separate action to send the “personal” welcome email.

And of course this would happen at 3AM our time because they’re in London and we’re in San Francisco.

So it either doesn’t pass the Turing test (i.e. it’s obviously a bot) or it reeks of desperation. Maybe both.

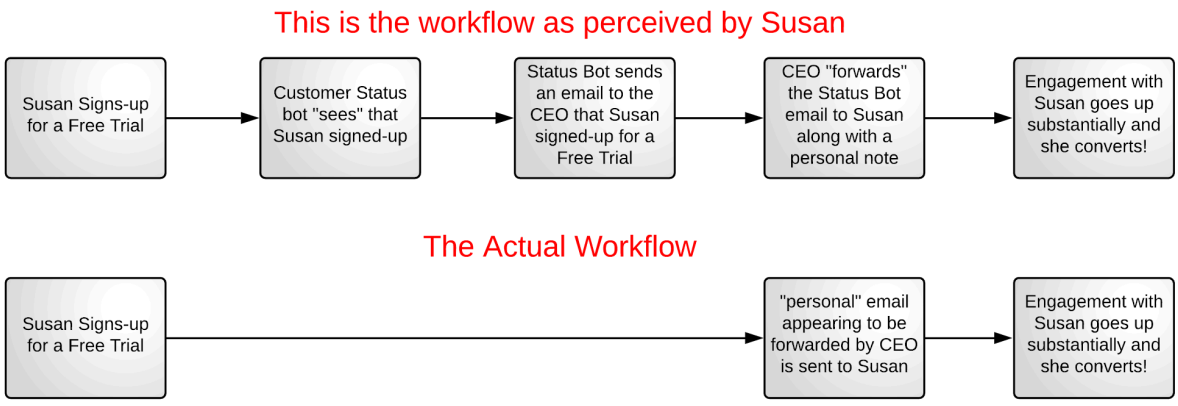
We need to change things up. We need to do something better. And then it hit me...

Better Personal Follow-up, at Scale

So I came up with this:

A message that appears to be our reaction to an automated system notification that we then forward to the contact with an appropriate message.

Brilliant (IMNSHO).



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So this way, it doesn’t look like we’re just waiting around for someone to sign-up and it seems like a 100% legitimate, personal message.

Be careful with this... do it wrong, and you lose credibility... do it right and you might get overloaded with customer conversations (which is probably a good problem to have, but can still be a problem).

Other “Customer Status bot” method Use Cases

Over the years I’ve come up with a lot of uses for this method.

Below are some additional uses for this concept:

1. Achieved their [First Success Milestone]
2. Support Ticket was just Closed
3. Requested Pricing
4. Requested a Product Demo
5. Completed a Survey
6. Canceled their Account
7. Visited the Cancel Page
8. Hasn’t been active in [x days]
9. Canceled their import

Business or Logical Response Hours

Whatever system you use - or if you roll your own - at the very least you need to be able to send the message during YOUR business - or at least logical response - hours. If it’s between 7AM and 7PM Mon - Sat, send... if not, queue it up and wait until it is.

Of course you may want to put in other parameters, like only responding to people from countries where you wish to do business, or - like I did - checking to see if it’s a real, not disposable - email address and then ensuring that it’s tied to at least one social profile. I’ve simply never had any luck with prospects that don’t exist on at least LinkedIn... so I automated that rule.

Ensuring that your email infrastructure is in place and that you have the appropriate business rules in place, the rest is about formatting the message correctly.

Infrastructure Considerations

But I can’t stress enough... this email MUST appear to be from you. Even better is when

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it actually is from you.

For instance, in the past, I used Zapier to react to any new subscriptions that came in through GetResponse to then send a message directly from my Gmail account - not relayed through their server but a message was created and sent via API.

So as far as anyone was concerned, it WAS an email from me... even though I didn’t manually type it.

That all said, if you have a more sophisticated infrastructure than I had - and you probably do - you can and should roll your own system so you can implement the necessary controls and not be limited by send limits. Just be sure to read my posts at the end of this document on creating the best email infrastructure to make this happen.

Ethical Dilemma?

However you interpret the CAN-SPAM and other rules that govern your email sending is up to you... I chose to not include an unsubscribe link in these emails because - even though automated - this email was not a “bulk” message and it was as from me as you could possibly get without me typing the message myself each time.

I’m not telling you what you should or shouldn’t do, but what I will say is that how you handle these messages vs. other lifecycle messages should probably not be the same.

If you choose to omit unsubscribe links from these messages to really play up the “personal” aspect of it, you probably wouldn’t want to do that with the other lifecycle messages.

To “Sent from iPhone” or not?

Way back in 2013-14, I also included “Sent from my iPhone” because, well... it appeared as if I was manually writing the message and it, frankly, worked REALLY well at engaging people.

Was I lying? Yes, technically, and now I feel bad for that. My justification was that if I sent this manually, I would very likely be sending it from my iPhone and that would appear on the message.

But it’s played out… don’t do this in whatever year you’re reading this.

Automation Rationale

If you think about it, all automation is - or should be - what we’d do manually if we had unlimited time and resources. I’d love to sit there on my iPhone and respond to

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everyone if I could... but I can’t, so I automated the process.

Also, this message must be sent from a real email address and/or that address must be able to receive emails.

The main Call to Action (CTA) for this message isn’t usually to click a link... it’s to reply to your message so you can start a conversation. You could get them to take an action in the email, but in customer development and sales conversations, that’s not what I lead with.

An open-ended question, their reply, and your response with the link can be FAR better than just initially sending them a link to click.

Fake Email Addresses / Personas

If you’re going to use an email address that isn’t your primary (i.e. a fake) or you’re going to create a new persona altogether, fine. You do you. But! There are some rules to follow if you’re going to do this right.

Fake / Secondary Email Address

If you’re the CEO, you may want to do this for all of the reasons already listed. But you may also not want to be the one actually replying to the customers and getting into conversations (not because you don’t value those conversations, but because you’re also busy). So you get someone else to do this for you.

You create a secondary email address very similar to your actual one and set someone up to monitor the inbox. You create canned responses so that person can reply in your voice and where there’s not already a response or they can’t figure out what to say, they can ask you for help, and - if it’s not a total edge case - create a new canned response for that.

Great. And obvious.

But what’s not obvious is that your email address is tied to all sorts of other information about you and that if you send from a fake email, when the person gets the message on the other end, the systems that bring in social and other information about who you’re engaging with won’t show anything about you.

You don’t exist. And that’s weird. Red flags abound.

So it’s either a fake email OR you’re brand new, have no background or credibility, or otherwise don’t exist. Bad sign.

So the trick is - where you can - add your fake email address as an additional email in your social account. Do this for Facebook, LinkedIn, Gravatar… I’m sure there are

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others that do this, too. Update other public records with your new fake email, like Crunchbase, AngelList, any place you can update business lead databases. Get others in your company - or your friends - to update the contact record in Gmail for you with your secondary email - and install ClearBit Connect for Gmail and sync that to the network.

Doing those things should ensure that your fake email address is associated with you.

Fake Personas

Creating a fake persona is something some companies do when they don’t want the CEO being the person that reaches out to the customer, no one else wants to do it, or they otherwise want to seem bigger than they are.

There are a lot of considerations that I won’t go into here when doing this, but assuming you have the name and a picture of someone that you want to use (and that you have permission to do so), create all the social profiles for them, and otherwise follow the instructions for the fake email above.

You want to make sure that when this “person” sends an email, when that email is opened, it appears to be from a real person. If you don’t show up in any of those contact context add-ons… you don’t exist and people will get suspicious and/or ignore you; maybe both.

And that’s pretty much the opposite of what we’re trying to do here.

Subject Line Psychology

This is where it gets good.

Since we’re forwarding them a message from an automated system, we get to jam pack the subject line with things that are proven to drive open rates AND there’s a 100% logical reason for including those. Win-Win.

Remember, the subject line has one job; to get them to open the email.

Since what we’re doing is forwarding the message from our “Customer Status bot” to the prospect, the subject starts with Fwd: ... this and Re: can significantly boost opens, but when abused it hurts trust... so use this sparingly.

In this context, however, it makes sense for all parties involved.

We also get to include another proven open-rate booster... the name of the recipient.

While this is often abused, it’s abused because it works. People like to see their names and it gets their attention. Coupled with the Fwd: this subject line will crush.

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I like to perform some level of validation - perhaps using Clearbit or something - to get more confident on their name before I start using it in my marketing.

If you can’t do that or don’t want to, you might at least pass it through a profanity checker like WebPurify so you don’t forward an email with obscene words in the subject.

If you can’t get a good name from them, just modify the messages below to exclude the name... it might not work as well, but I suspect it’ll still do better than what you’ve been doing.

Some examples for the use cases listed above might be:

1. [App Name] Alert! [Customer Name] Created an Account
2. [App Name] Alert! [Customer Name] Achieved their [First Success]
3. [App Name] Alert! [Customer Name’s] Support Ticket was just Closed
4. [App Name] Alert! [Prospect Name] Requested Pricing
5. [App Name] Alert! [Prospect Name] Requested a Product Demo
6. [App Name] Alert! [Customer Name] Completed a Survey
7. [App Name] Alert! [Customer Name] Canceled their Account
8. [App Name] Alert! [Customer Name] Visited the Cancel Page
9. [App Name] Alert! [Customer Name] Hasn’t been active in [x days]
10. [App Name] Alert! [Customer Name] canceled their import

Unless the person who will be “forwarding” this message to the prospect / customer / user has ”Earl @ [Company]" - which is totally valid, BTW - I'd put your app/company name in the subject line just to ensure context so it ends up looking like this:

Fwd: PowerApp Alert! Joe at Salesforce canceled their import

Use their Company Name or the Person’s Name

The person’s wherever possible. If Joe Smith from Salesforce signs-up for your Free Trial, you might be stoked that Salesforce might become a customer.

But it’s Joe that’s just trying to do their job. We can scramble and swarm behind the scenes knowing the potential gravity of someone from Salesforce becoming a prospect, but if we lose sight of Joe and their needs, we might lose that huge potential opportunity.

When working with existing customers, you might gravitate towards the company name, while keeping the contact in the mix.

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If Salesforce was a customer and Joe Smith was the contact, and Joe canceled their account, the subject might look like one of these:

Fwd: Joe Smith from Salesforce canceled their account

Fwd: Salesforce (Joe Smith) canceled their account

That makes sense since your company has a relationship with their company at a contact/financial basis, but has the real, ongoing, interactive relationship with Joe (and, likely, others).

When to Send?

First, go back and read about Business Hours; all replies should happen within your business hours or logical response window.

Notice that I mentioned timing above... we tried 17 minutes post-signup, 1 hour... 1 day, etc. You’ll see in the examples below we even used this method on Day 10, too.

Ultimately, timing is something to test, for sure. I don’t know what will work best for your audience, but to ensure you start testing from a solid baseline, really think about the person you’re emailing.

What are their expectations, goals, needs, dreams, wants, desires, fears, etc. No really... think about that more than anything else. Get inside their head. Understand them better than they understand themselves... and then start testing from there.

So I don’t know what the best timing for this will be for you, though

I can say a demo request will likely require a different response time than an email list sign-up and those will be different from a follow-up to a Free Trial sign-up.

Remember that follow-up timing will also be affected by whatever rules you have in place, like only sending during local business hours.

It may even be affected by what actions the prospect has taken in-app (i.e. don’t send a personal follow-up if they’ve already completed the Common Conversion Activities [CCA]... just make an offer to get ‘em to convert).

Message Format

Now, as for formatting, this message MUST be sent as a plain text or as a plain text-looking HTML email as if it came from the person sending it.

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In other words, while you might personally send rich emails that use colored fonts and an image in your signature, it still looks like an email from a person.

That’s what we’re going for here... not a newsletter. Not an overly-designed email that clearly no actual person would send to another person. If you wouldn’t type it up and send it to someone you know, don’t use it here.

Keep the email short, sweet, and end it with an open-ended question (not a yes or no question) that will cause them to respond with something meaningful that we can build the conversation off of.

It’s harder to ignore an open-ended question (I think science backs that up, but for the skeptics, we’ll just say this is my observation) and we’re trying to start a conversation... yes or no questions don’t lend themselves to deep understanding and meaningful conversation.

Examples Start on the Next Page

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3 “Customer Status Bot” Method Examples

Example #1

Alright, here are some ways to use this method, but I encourage you to use your imagination...

From: Sara @ MyLMS <support@mylms.app> To: <fname> <lname> <emailaddress> Subject: Fwd: [New Member] <fname> <lname> signed-up to try MyLMS

<fname>,

Our system told me that you signed-up for a free trial of MyLMS, so I thought I’d say hello, and see if you need assistance getting started with MyLMS (yes, even during your free trial!)

Also, I’m curious... before you found MyLMS, what were you using to deliver your training courses?

Welcome aboard,

Sara Smith MyLMS Customer Value Team (123) 414-9999

---------- Forwarded message ---------- From: MyLMS System <system@mylms.app> Date: Sat, May 20, 2013 at 11:39 PM Subject: [New Member] <fname> <lname> signed-up to try MyLMS To: support@mylms.app

Sara, I wanted to let you know that <fname> <lname> signed-up to try MyLMS

++ MyLMS.app System Message

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Example #2

Subject: Fwd: <fname> <lastname> requested an EZFinder Demo

Hi <fname>,

The system told me you requested a demo of EZFinder and I wanted to let you know that Dave - your account exec - will contact you shortly.

By the way, <open-ended question>?

Cheers!

Patricia Smith, President EZFinder

Sent from my iPhone

---------- Forwarded message ---------- From: EZFinder Customer Status bot <success@ezfinder.app> Date: Sat, Apr 20, 2013 at 11:39 PM Subject: <fname> <lastname> requested an EZFinder Demo To:

Patricia, I wanted to let you know that <fname> <lname> requested a demo.

Thank you,

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Example #2

EZFinder Customer Status bot #end transmission#

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Subject: Fwd: <fname> <lastname> is 10 days into their trial

Hi <fname>,

The system told me you’re well into your Free Trial of AnotherLMS. That’s awesome.

I want to ensure you have everything you need to properly evaluate AnotherLMS.

By the way, <open-ended question>?

Don’t forget that if you need anything, have any questions, or if you’d like me to give you a demo of any part of AnotherLMS, just let me know.

Ciao!

Sandy Pierce AnotherLMS

---------- Forwarded message ---------- From: AnotherLMS Customer Status bot <success@anotherlms.app> Date: Sat, Apr 20, 2013 at 11:39 PM Subject: <fname> <lastname> is 10 days into their trial To: nancy@anotherlms.app

Nancy, I wanted to let you know that <fname> <lname> is 10 days into their trial of AnotherLMS.

Cheers,

AnotherLMS Customer Status bot ++ Ciao!

About Lincoln Murphy

Lincoln Murphy is a world-renowned Growth Architect, Consultant, Author, and Keynote Speaker. As one of the earliest evangelists for Customer Success, Lincoln was invited to co-author the book on Customer Success. As founder of Sixteen Ventures, he has influenced tens of thousands of companies around the world - and directly helped thousands through consulting and workshops - to get their customers to stay longer, buy more, and advocate for them publicly by focusing on the customer’s success.

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