

How to automate cold email and generate high-quality leads for your agency.

The 1-week action plan for planning, launching, and getting meetings from your cold email campaign.

**Q: “How do you
get your clients?”**

**A: “Referrals and
word of mouth.”**

**What's the fastest way to
grow your agency?**

Win growth clients.

6.3

hours/day

The time US workers spend checking email

About Dan

Founder, Sales Schema

First employee, IdeaRocket
0 to \$2M+, dozens of Fortune 500s

Author, *Mastering Account Management*
and *The B2B Sales Blueprint*

Previously, Account Coordinator at
DXagency



“Isn’t unsolicited email illegal?!”

Generally no, but look into your local regulations.

US CAN Spam rules:

- No misleading subject lines
- Indication of what you’re selling
- Valid business address
- Clear way to opt-out of future communications

“I always ignore cold emails...”

Most do it wrong:
bad targeting, timing, and/or self-serving messages

You're looking for responses from a small percentage, not
“most people” (like most marketing channels)

“This won’t work for my high-end clients.”

Successful agencies using it to win huge clients.

Employees in large orgs. use the same methods to find vendors as everyone else: Google, email, social media...

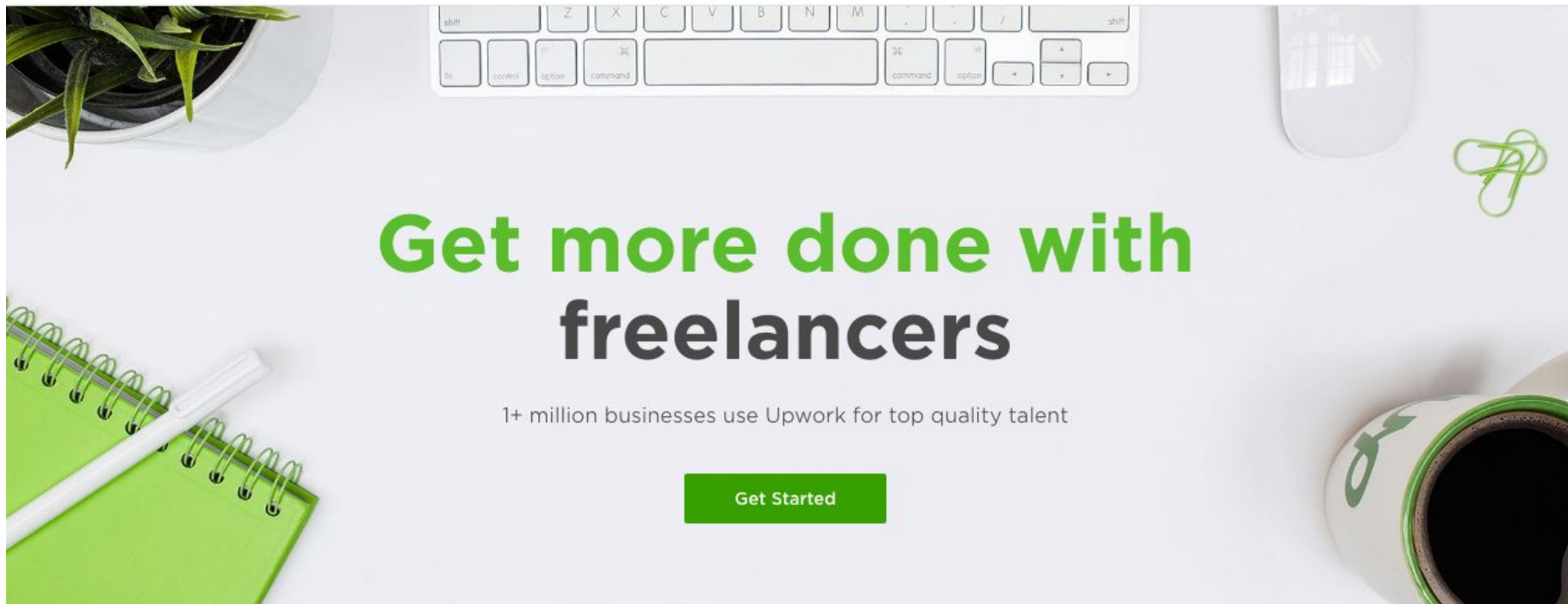
**The 1-week action plan for
planning, launching, and
getting meetings from your
cold email campaign.**

Day 1: Job post for lead gen. VA

Step 1: Create hiring account on Upwork

Step 2: Post hiring ad

Step 3: Invite 20-30 people to apply



Get more done with freelancers

1+ million businesses use Upwork for top quality talent

[Get Started](#)

Work with someone perfect for your team

Upwork Tips

- Rate for research and data entry: \$4-7/hr
- Build up your Upwork history to get better talent
- Use Google forms to weed out the template responders
- Best lead gen talent: Philippines and Eastern Europe
- Make sure they know how to do email research
- Eventually get your people off Upwork (high rates)
- Hire fast, fire fast
- Keep good freelancers on board

Day 2: Create targeting game plan

1. Where do you have leverage?
2. Where is there market growth?
3. Who are most receptive?

Day 2: Create targeting game plan

Know your numbers

- Total marketing budget: ~5% total yearly revenues
- Agency world: 1 employee ~\$100-200k yearly revenues
- Have a floor AND a ceiling

Know your avatars

Title(s) and verticals

Know your triggers

New hires, funding rounds, clients, products, or events

Day 2: Create targeting game plan

OUTPUT:

CMOs at B2B SaaS companies, \$1M-10M revenues, recently hiring developers

Owners at \$500k-\$20M clothing companies, recently rolled out a new product

Dir. of Comms at \$10M-50M PR firms, new client acquisition

Day 2: Create targeting game plan

Create spreadsheet template (Google spreadsheets are best)

How can you demonstrate impressive research (even if it's automated)?

What will fit in a spreadsheet cell?

What will look natural and relevant in an email?

Day 2: Create research game plan

Identify trigger research sources:

- Funding rounds: AngelList, Crunchbase
- New hires: LinkedIn jobs, Indeed, Career Builder...
- New products, events, PR: PR Newswire, Google
- Software and tools: BuiltWith

→ LinkedIn: the chopping block

Hash out rough research procedure, make sure you can walk another through it.

Days 3-6: Hire lead gen. Freelancer, start research

Step 1: Arrange interviews, give all instructions (share your screen, record the video)

Step 2: Give them the recording, spreadsheet template, delegate SOP creation

Step 3: Test assignments (paid), followed by hire

Step 4: Start research, communicate benchmarks
(50-100 targets per day is ideal)

Step 5: Review results periodically and correct course over 24-48 hours

Day 7: Write, schedule email sequences

Avoid autoresponder/inbound email platforms like MailChimp, aWeber, or ConvertKit

IMPORTANT: use alternate domain ie. .co, .net...

Set up SPF/DKIM registration - helps deliverability

-Quickmail (my favorite)

-Tout App

-SendGrid

Day 7: Write, schedule email sequences

Keep it short: 3-5 short paragraphs

BEGINNING:

Custom subject line, questions are good

Demonstrate understanding, use custom fields

Tone: think reconnecting with an acquaintance, NOT marketing copy

MIDDLE:

Sell opportunity, demonstrate falsifiable results

BAD: “We’ve built stunning websites for our tech clients”

GOOD: “Our sites have helped our SaaS clients convert 5% more leads in less than 3 months.”

Day 7: Write, schedule email sequences

END:

CTA: low-commitment conversation

BAD: “Can we schedule a meeting for next week to see if you’re a fit?”

GOOD: “Can we chat briefly next week so I can give you all the details on the program?”

Put it at the end, and don’t muddle it.

SUB: Saw you're hiring **{{hiring title}}**s at **{{company}}** and thought this might be interesting

Hi **{{firstname}}**,

I'm reaching out because I saw on **{{hiring site}}** that **{{company}}** is hiring **{{hiring title}}** s - congrats on your expansion, and your recent **{{funding amount}}** **{{funding round}}** !

I specialize in sales process development, and I help sales leaders in growing startups to win more clients and go deeper into existing accounts. As for braggadocio/results, I've helped clients 5X their revenues, encompassing dozens of Fortune 500 customers.

If this sounds relevant, can we chat briefly sometime in the next week so I can give you all the details on the program?

Cheers,

Dan

PS: if I'm completely off base here, just let me know and I'll never contact you again

Day 7: Write, schedule email sequences

Sequence (a response automatically breaks the chain)

Space out by 3-5 days

Email 1: Offer

Email 2: Professional persistence

Email 3: Risk reversal

Email 4: Break up, loss aversion

Still no response? Helpful content, downsell offers...

Days 8 and beyond: Optimize and repeat

Metrics: Open rate and response rate

Send no more than 50 emails/day

Open rate: go for 70%+

Response rate: go for 10%+

A/B test subject lines at first, then body content

Someone unsubscribes? No biggie. Just set as “do not contact” and move on.

“Can someone do this for me?”

5X growth in less than 2 years

Average close rates: 20%

“Can someone do this for me?”

Option A. We deliver meetings with high-quality leads, right to your inbox so you can start closing deals.

Option B. We give you the fully customized, step-by-step strategy so you can get results sooner rather than later.

Want all the details? Hit me up: Dan@SalesSchema.com