3 Ways to Scale Personalization Without Burning Time (With Templates!)

RocketReach

30 MINUTES TO PRESIDENT'S CLUB

What's going on folks! Charlotte Johnson here, Club Host and multiple-time guest with 30 Minutes to President's Club.

A lot of reps skip territory planning because it's a non-selling activity.

But imagine if you wanted to bake a cake without planning your ingredients or shopping for what you need - just rummaging through your cupboard. Yikes? The result wouldn't be as good as if you had actually researched, planned, and prepared. The same applies to territory planning!

Not only does this give us a solid understanding of our account patch, but most importantly, it helps us **spend time on tasks that will drive the highest conversions**.

Let's break that down into 3 big chunks:

1. How to manage & segment your account territory by impact
2. How to personalize at scale
3. How to engage decision-makers with the right messaging

And by the way, we're here with our good friends at RocketReach, whose Autopilot features help you stay ahead with up-to-date contact and account lists at your fingertips.

Let's dive in.

#1: How to Manage & Segment Your Account Territory by Impact

Not all accounts are created equal.

If you're treating every lead the same way, you're either **wasting time** on low-priority accounts or **not dedicating enough effort** to your biggest opportunities.

Here's how you can segment your territory and where you should spend your time:

Account Tier	What that means	How to work
Signal-Driven Accounts (50% of Time)	Any account showing **clear buying signals**, like job changes, funding rounds, product launches, etc.	Immediate high-priority outreach. Add personalization **based on a buying signal.**
Tier 1 (30% of Time)	Big, high-potential accounts that can significantly impact revenue.	Deeply personalized outreach. Executive-level engagement. Multi-threading across key stakeholders.
Tier 2 (15% of Time)	Mid-sized accounts with good potential, but the deals are lower.	Semi-personalized messaging. Scalable personalized using relevant triggers.
Tier 3 (5% of Time)	Smaller accounts or less engaged accounts.	Automated outreach. Light personalized based on role/industry.

Here are a few common mistakes where sellers waste their time:

1. Getting stuck on Tier 1 Accounts

Reps often spend too much time on Tier 1 accounts. While these are high-value deals, be prepared that they come with longer sales cycles, more stakeholders, and stricter budget approvals. **So, do not spend all of your time here**. Relying solely on Tier 1 accounts is risky because:

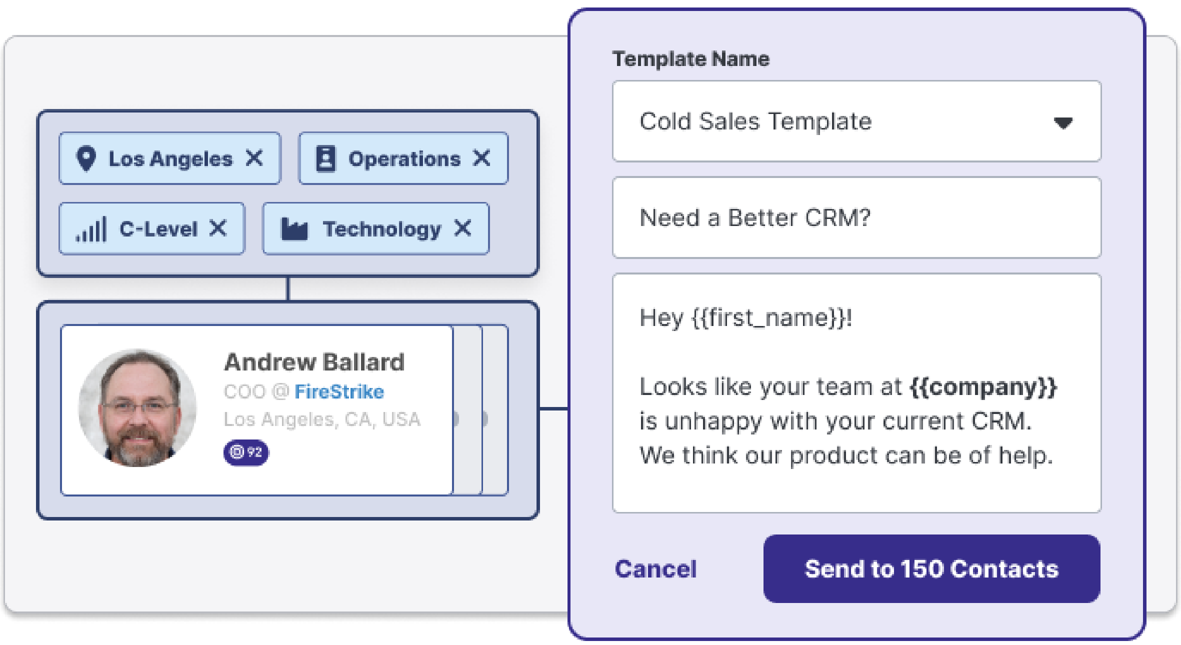
- These deals take longer to close, which jeopardizes your quota.
- More complexity means a higher likelihood of deals stalling.
- Without smaller, quicker wins, your pipeline health suffers.

💡 **Pro Tip**

Balance your pipeline with a healthy mix of Signal-Driven, Tier 2, and Tier 3 accounts. These accounts help you **hit your targets in the short term**, while Tier 1 accounts position you to **make President's Club in the long term**.

2. Wasting Too Much Time on Research

Reps can lose hours and hours down the rabbit hole scrounging for leads and writing out overly personalized messages. While personalization is important, **spending too much time on each account hurts your productivity**. Work smarter not harder!



💡 **Pro Tip**

Use RocketReach Autopilot to:

- Automate contact list updates, ensuring you always target the right people.
- Surface real-time buying signals so you reach accounts when they're most engaged.
- Scale personalization efficiently without sacrificing quality.

The takeaway? A strong territory plan helps you prioritize your efforts, balance short- and long-term opportunities, and work smarter, not harder.

#2: How to Personalize at Scale

Personalization at scale isn't about hand-writing every single word of the email. No one has time for that

But did you know you can **automate an email and still make it look personalized**... you just need to be smart about how you organize the lists in your segments.

It's all about **personalizing based on the buying signal**. This makes automation feel personal.

Buying Signals That You Can "Personalize" For:

Buying Signal	What that means	Your Outreach Looks Like This
Recent Hiring	New leadership often means new business initiatives.	"Great to see you've hired a new VP of Demand Gen. How are you shifting strategy to drive higher-quality pipeline?"
Funding Rounds	Companies with fresh capital are often investing.	"Your funding announcement talks about expansion into new markets. How are you ensuring reps can adapt their messaging across markets and execute confidently?"
Job Descriptions	Reveals a company's priorities and pain points.	"Saw your SDR job post mentioning outbound automation. How are you balancing scale with personalization to drive more replies?"
Mergers/Acquisitions	Business shifts create new opportunities.	"Reading the acquisition article, talks about unifying processes. How are you ensuring a smooth sales integration without disrupting pipeline?"

Now, here are a few examples of personalization (that scales):

Highly Personalized (Tier 1)

Context:

- **Common Connections:** You identified the relevant POCs through shared contacts.
- **Manual Research:** You checked out annual reports, leadership changes, and company news.
- **Groundswell Intel:** You spoke with lower-level employees to understand tech stack, priorities, and challenges.
- **Internal Referral:** You scored a referral from an internal team member to the correct POC and have insight on their current focus.

Example Email:

> *Billybob mentioned you've recently taken over [competitor solution] responsibilities, Fred.*
>
> *Read an article which mentioned [company's] success in reducing losses and increasing turnover by hiring less.*
>
> *With this & your expansion into Canada, I'd imagine there's interest in maximising the current team's effectiveness as you scale globally.*
>
> *Salesloft leverages AI to streamline workflows, prioritise tasks, surface risks, and highlight key insights – helping teams find and close deals faster.*
>
> *Would it be worth exchanging a few messages to explore?*
>
> *Charly*

Tiers 2 & 3 (Scalable Outreach)

Context:

- **(Some) Signal-Based Personalization:** You've identified all these accounts are hiring for a role that signals a specific need (e.g., AE job descriptions highlighting pipeline generation).
- **Automated Prospecting:** You used Autopilot to identify relevant stakeholders and auto-add new hires to your prospect list.
- **Efficient Execution:** You can send an automated email that still feels a little personalized.

Example Email:

Hi [Name],

The AE role you're hiring emphasizes new logo bookings.

How are your sellers managing their workload without neglecting prospecting?

Kalidu saw their AEs increase self-source bookings by 24% using Rhythm to prioritize contacts more likely to convert.

Something you're thinking about or am I off here...?

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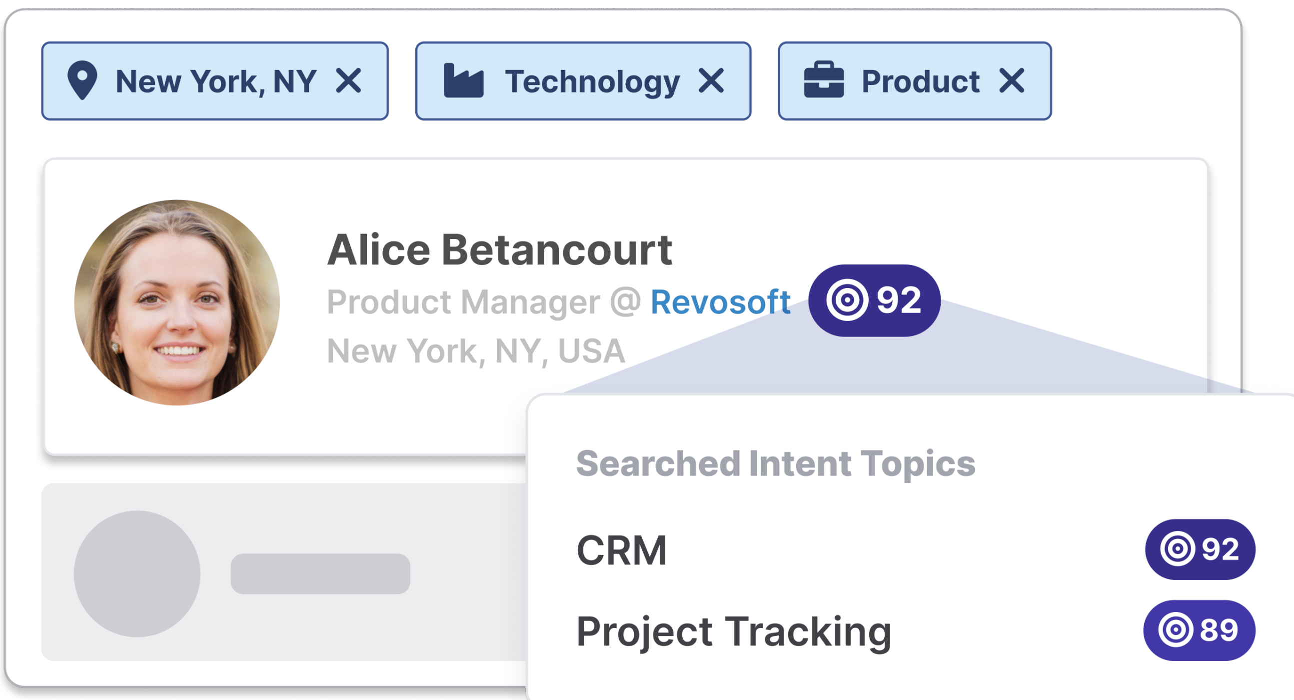


RocketReach Autopilot means you always have actionable, the most up-to-date intel at your fingertips

- Its filters allow reps to identify **buying signals in real time**.
- It surfaces insights you can take action on to **make your personalization feel genuine**, (even when it's actually automated).

3: How to Engage Decision-Makers with the Right Messaging

Sometimes you find a 10/10 fit company, but no matter how personalized and persistent you are, you just can't seem to get a bite. But you can **use groundswell to gather intel before engaging with the decision-makers.**

If you're not breaking through and catching their attention, it's probably because

(1) You're not reaching out to the right person.
(2) You've not hit a problem that's important to them right now.

To swerve past this obstacle, use Groundswell!

Getting this groundswell intel will help you book more meetings with power:

- **Tech Stack:** Do they use a competitor? Is it well adopted and liked?
- **POCs:** Who are the stakeholders responsible for these projects? Have they tried other solutions?
- **Company Objectives:** What are their key priorities, pain points, and focus areas?

Here are example emails that are strengthened by groundswell intel:

Email 1: Deposit

> *Hey [Name] - saw you're one of the AEs over at [Company]. Not sure if the team are looking for inspo on how to book meetings, but this tactic Armand shared from 30MPC has helped our team book 7 meetings this week!*

Email 2: Follow-up & Ask

> *Hope the tactic helped! Random question - is your team struggling with pipeline generation? Seems to be the common trend right now.*
>
> *If so, I can share a couple more tactics that are working for us, but would also love to ask a couple of questions if you're open?*
>
> *Either way, hope you & the team are doing alright in these difficult times!*

So you've nailed the messaging with groundswell intel. Feels good, right? Now, I'll show you how to reach out to the right person with the right personalization.

Send Direct Messages to the Right Stakeholders

With this intel, we can now reach out to **the right person with the right messaging**!

From that Groundswell, we know

- **Their Focus:** They're making a big push on self-sourcing opps
- **Competitors:** They don't have any solutions in place right now
- **POC:** We know we are reaching out to the right stakeholder

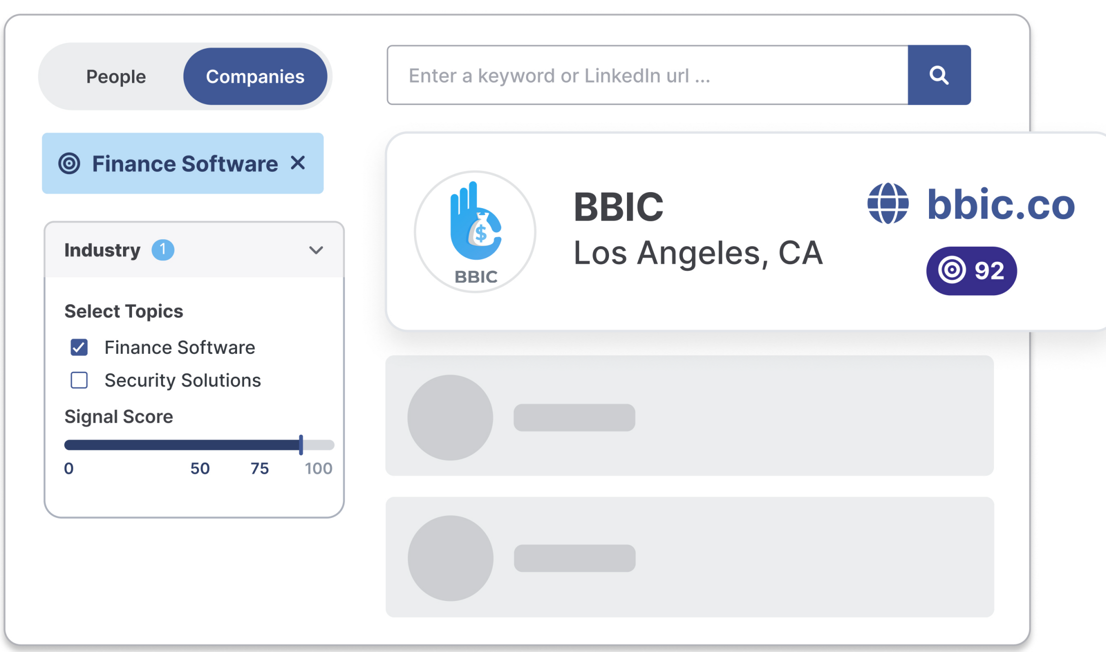
Example Email:

> *Spoke with Andrew & he mentioned a big push on AE's self-sourcing, Billy.*
>
> *Which makes sense as the AE role you're hiring for emphasizes outbound activity.*
>
> *Many AEs see themselves as deal closers and view prospecting as something meant for SDRs. How are you shifting this mindset?*
>
> *Klaviyo increased AE self-sourced opps by 32% by surfacing prospects most likely to reply, turning what is usually a tedious task into an easy one.*
>
> *Open to learning more?*

There are two ways you can find groundswell contacts:

(1) Use manual Sales Intelligence Tools to identify relevant entry-level or mid-level contacts within key accounts.

(2) Use RocketReach Auto-Pilot to automatically enlist and track relevant new hires and outreach targets.



And guess what? RocketReach **cuts your time spent on outreach in half** and gives you all the right intel:

- Saves time by automatically enrolling reps into outreach.
- Surfaces real-time buying signals so you can focus on the right accounts.

Let's recap!

We covered **3 ways to scale personalization without burning time**:

(1) **Segment Your Account Territory by Impact** - Spend 30% of your time on Tier 1, 50% of your time on Signal-Driven Accounts, 20% of your time on Tier 2 & 3 (with lots of help from automation!).
(2) **Personalize Based on Buying Signal** - Hiring, funding, job posts, and M&A events are goldmines.
(3) **How to Engage Decision-makers with the Right Messaging** - Leverage Groundswell to gather intel before engaging key decision-makers.

If you're armed with RocketReach, you'll always be working the best accounts with the freshest data.

Learn more here!