



SPI 361
**Super Simple
Segmentation & Web
Personalization for Next
Level Marketing – with
Brennan Dunn**

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Pat Flynn: Hey. If email marketing is important to you, if making more sales is important to you, if providing a better customer experience before they become a customer and after they become a customer is important to you, then I would make sure you really pay attention to this episode.

Today, I invited Brennan Dunn from RightMessage.com on the show. And RightMessage is probably one of the most mind-blowing tools that I've been able to use in my business over the last year. We've been experimenting with it and really playing with it over the past six to eight months. And it is about time to let you know about it, if you don't know about it already, because it's a game changer. A game changer. [Full Disclosure: As an affiliate, I receive compensation if you purchase through this link.]

So what we're gonna talk about today, is onsite and email personalization, segmentation, learning more about the market that you are serving already, and how to actually better serve them through learning by their actions and their answers to questions. And we're gonna talk about how to segment your audience, all about the interaction, so that you don't just make more money but you can better serve your people, too. It is amazing.

Let's get to the intro.

Announcer: *Welcome to The Smart Passive Income Podcast, where it's all about working hard now, so you can sit back and reap the benefits later. And now your host—he's writing a new book as we speak—Pat Flynn!*

Pat: Hey, Team Flynn. Welcome to Session 361 of the Smart Passive Income podcast. My name is Pat Flynn, here to help you make more money, save more time, and help more people too. And sometimes that happens as a result of inspiration. Sometimes that happens as a result of just learning strategies. And sometimes that happens because some tools give you the ability to do all of those things. And saving time, helping more people, a great byproduct is making money. All these things come as a result of this tool and

the principles that we're gonna talk about today with Brennan Dunn from RightMessage.com.

He has an amazing story that ties into exactly why he developed this product. It's very similar to the story that we heard with Nathan Berry, related to what he was doing before. And then how he just had this major pain and created a solution for email, which then became [ConvertKit](#). [Full Disclosure: I'm a compensated advisor and an affiliate for ConvertKit.]

This is Brennan's story about how, where he came from, what he needed, what he built, and now what he's offered for all of us. And again, like I said, this is a tool that we've been using, RightMessage, and it's been game changing.

So even if you're just starting out, learning these principles are gonna be really important. So don't think that because I'm gonna be talking about a tool here, that you already have to have something going. And especially if you have something going, then this could be the next big thing for you.

So, here we go, Brennan Dunn from RightMessage.com.

Hey, Brennan. Welcome to The Smart Passive Income podcast. Thanks for being here, man.

Brennan Dunn: Thanks so much, Pat. Good to be here.

Pat: Yeah. This is funny, you know. You and I have known each other for a while, and I knew you back when you were really focused on helping freelancers make more money, which was really cool. So, I kinda want to rewind and take us back there and then connect the dots between that and this amazing tool that my team and I absolutely love. And then I wanna recommend to everybody—and we'll let you know more about that in just a second, but take us back to your freelancing career, and kind of how thing kinda happened from there.

Brennan:

Sure. So, I think I quit my day job back in 2006. So I've been working for myself for a while. In 2008, I built an agency, set aside—you know, I was getting more work than I could handle. So I dived off the deep end and got a lease on a brick-and-mortar office. Hired a team, did all that stuff. Got a bunch of employees, but really I had a lot of friends who were making really good money in software online.

So I liked the idea of having a lot of people paying me a little bit of money, versus a few people paying a lot of money. So I decided actually to shutter the agency. I started a project management SAAS called [Planscope](#), which was meant for freelancers and agencies. It's still around, but I sold it a few years ago.

And that kind of led me to this wonderful world of online business. And the thing that happened with that was I realized very quickly that it's very hard to get customers. So I thought, you know, I'd build a great product and people would flock to it, and everything would just be great. And it didn't work that way.

So I ended up writing a lot about all things freelancing and consulting, with the hope that that would bring in trials for Planscope. Well, that did well. And that turned soon into an ebook, which then turned into a course. And I've done now four or five different—four conferences, not five. Four conferences, two in Europe, two in the U.S. And got a podcast. And this is all now under this brand called [Double Your Freelancing](#), which used to be really just a content marketing arm to grow my software company, Planscope.

So got to the point where I couldn't handle both. I sold Planscope in 2016. And a big thing that has kind of been a mainstay with Double Your Freelancing—which again, it's kind of a, it's like your set. It's a blog, a lot of content, there's a podcast. We sell courses. And one thing I realized pretty early on was that there are a lot of different types of freelancers. So some are designers, some are writers, coders, and so on. People have, are in different stages. So some are just starting out, others are more established.

And my background is in software engineering. So I thought, what if I could make it so if they're on a sales page, a designer's looking at that sales page and they're gonna see testimonials from other designers. And then likewise, a copywriter is looking and they're gonna see copywriting testimonials.

So I kind of wrote from scratch a lot of code that made that work and got on the interest list of a lot of more established companies who were saying, well, can you do that for us? So dabbled in consulting to do that for a few companies. It worked out really well for them. I ended up building a course on automation and personalization—that did it even better. And the biggest complaint in that course was, “I love the theory. I love what you're teaching. But you telling me to hire a coder is not what I want to do.”

So that's what led to what I'm doing now, which is RightMessage.

Pat: So essentially, what RightMessage does and what you had done for consulting before building it, is you are helping us understand how to personalize the experience that our audience has on our website.

I'd love to go a little bit more deeper into that in talking about maybe like, why does this work so well? And what could we even do right now that we aren't doing, even before getting involved with anything, if anything is available for us?

Brennan: Yeah, so I think to answer that first question of why does it work, the thing that I like to tell people is—it's such an age-old thing. I mean, none of this is new. Back when I was selling consulting, if a CTO lead comes to me and I'm speaking with them over the phone or in person, I'm gonna be more technical. I'm gonna reference, like, if I know their industry they're in, I'll talk about other projects we've worked in in that industry.

And that's just how we kind of naturally convince people offline, right? Offline, if I'm at a conference—so next week I'm gonna be at a B to B conference in Europe. And I'm inevitably gonna be asked at the after-party, “So, what do you do?” Right? And my response

at that conference is gonna be, you know, it's a sales conference, so I'll talk about the tools I use. I'll be a little more technical than I would if I were at a local kind of business mixer thing that was going on in my town.

So we all kind of do this, right? We change the way that we talk about what we do or what we offer, based on who we're speaking with. So the idea is, well, what if we could do something, that same thing, but online? So basically, have all the benefits of niching, but without actually needing to have a fully niched website.

So that's personalization in a nutshell. Where it gets harder, though, is how do you figure out well, who is this person? And what stage of business are they at? And how do they self-identify, and what do they need? And then, how do you go about changing that?

So that was the challenge with us as a business, was making that more accessible, really, to everyone.

Pat:

Right. And a lot of you know that a couple of years ago, or a few years ago, I got involved with ConvertKit, which I love. And it's a tool by Nathan Berry. He's been on the show before. Email service provider. And what I loved about that is it gave me the ability to start thinking about personalization, because those tools allowed me to do that in my email sequence, specifically. And it was my job in the email sequence and the way that I structured those emails to track, you know, what people clicked on. And then, where to take them, and what bucket to put them into. What sequence to put them into, what campaign to put them into.

I started to see massive results inside of my email environment, because of that personalization. My open rates increased. My click through rates massively increased, and just the general feeling that I was getting from my audience, because I was giving them information that made sense for them.

But that was all after they came to my website, all that personalization stuff then happened. And what I love about what

you're doing now, is you're allowing us to better understand how to deliver more specific, targeted messages to our audience even as soon as they get on that website. Or as soon as they—as soon as we start to learn even just a little bit about them, even before they come on our email list in some way.

And then, what I love about what you've been able to build and what RightMessage and what RightAsk has enabled us to do is, now that we know where they are, we can serve them different things back on the website. And that's, it's blowing my mind, for one. Number two, it is making us make more money.

And a good example of that is recently we had our Cyber Monday deal, which we called SPI-ber Monday, and thanks to RightMessage and its integration with ConvertKit—and it integrates with a bunch of different things—we were able to serve everybody the same Cyber Monday page. But it was different for them, depending on where they're at and what questions they had answered, or if they were already a customer they wouldn't see the promo for that particular product. They would see the other ones that they didn't have access to. If they were a beginner in the audience, they wouldn't see the more advanced courses. If they were an advanced person, they wouldn't need to see the stuff for beginners.

And it's just been really amazing to see, not just the numbers climb, but just the direct response and comments from people saying, "Thank you for showing me exactly what I needed." So there's a couple sides of this coin here of personalization. There's the idea that people can understand that you know where they're at, so then, that activates them to go, "Oh, well then you must have the solutions." But then, even after the solution is given, it is the idea of, "Thank you for putting me in my own path."

And I, again, I'm just so blown away by the tool. And so, for anybody doing email who wants to know how to better give messages to their audience, RightMessage right now is my top recommended tool for doing those kinds of things.

And so I'd love to have you speak on, really, who is this for? And how can one just get started with it? I think we'll mention a trial offer and stuff for this tool. But it is really the next phase for, I think, business right now. And everybody who has an email list should be paying attention to this tool, which is why I wanted to bring Brennan on.

So that's just a very long testimonial for you, I guess.

Brennan: That's awesome to hear.

Pat: It's so true, how . . . And we've just scratched the surface with what's possible, too. So I'd love for you to start by talking to the audience about just, how this works, how we can use it, and obviously, with the many ways that we can, what would be the most impactful ways to use it?

Brennan: Right. So I think the biggest thing . . . So, I know a lot of your audience is familiar with [Ryan Levesque and the Ask Method](#), and everything like that. So we're very complementary to that, in the sense that we believe you can't personalize without segmentation. So you couldn't have done the SPI-ber Monday personalized offer pages if you didn't have that backing data to . . . If you knew Brennan is in this segment and that segment, and everything, without that data you couldn't have done that, right?

So, we start with segmentation. That's something that we— cause we've realized that personalization as a concept is kind of overwhelming for people, cause you don't know where to start. It's kind of a new, new concept and everything like that. But the big thing that has really been resonating with people is, everyone has drank the Kool-aid now about email marketing. We know how effective automated messages over email are, right?

And like you were saying, you've been using trigger links for a while within ConvertKit to be able to say—part of your onboarding is asking things like, have you not started a business yet? Are you still

kind of getting your feet wet? And are you scaling?

And you would use those clicks on those links within your initial emails to segment people. So you were doing a lot more than what the average email marketer is doing. So we surveyed our list, which is about six thousand people, and we asked them, “How are you currently segmenting? How do you currently break up your audience?”

And 75 percent of people only segment by purchases, meaning they only tag you if you’re a customer. And they tag you if you bought this or that. But beyond that, very few people are asking things like, “Who are you? And what do you need from us?”

So our big thing that we’re trying to convince people to do, with or without our software, is to get better at being able to slice and dice up your audience, your list, by things, specifically things like what do they need from you? So, how can you best serve them, along with how do they identify? So, are they in this industry? Are they this job role? You know, this and that.

And you can do that through a number of ways, right? Like, you can use trigger links within a tool like ConvertKit, where really, most email marketing apps support this now. We have a tool built into RightMessage that lets you do that on your website, which you are using now to kind of, in a way, back up, if you think about it, back up the trigger links; cause they can either segment themselves on your website by reading, say, your newest blog post, or by clicking that link in that onboarding email. Right? So they both kind of write to the same kind of record.

So, we’re really big on trying to get people to start there. Cause once you’ve done that, you’re gonna start getting metrics about, “well, 40, 50 percent of my audience is this. And I’m not doing anything to make it more clear how I can help them with that.” So once you get the kind of overarching high-level data, then it’s a matter of thinking, “Well, if somebody like this is reading the sales page, or looking at a call to action, how can we better position that

product or that offer, based off this?” Right?

So if they’re starting out, they’re not gonna want to see a bunch of testimonials from people who are, you know, “I was making a million dollars a year, and now I’m making 10 million.” That might be a little overwhelming for them, right? So, we’re typically encouraging people to start with getting that data right, so, segmenting your list. And using a tool like ConvertKit as your single source of truth as where you keep all the data about, “This is Pat. This is what we know about him, based on what he’s told us or how he’s behaved.” And I can touch on behavior in a second.

And then, you can start thinking, “Well, how does that affect the emails I send Pat? Or how does that affect when Pat gets an email promoting our newest course, and he clicks out of that email to go to our site to buy, how do we continue that theme, that positioning, that we first had in our email on the sales page?” Right? So that’s, we’re always telling people to start with segmentation. Start with finding out ways that you can better understand and kind of segment out your email list.

Pat: I 100 percent agree. Segmentation is so important, because although a lot of us are smart and niched down and have a focused market, within that market and within your audience there are gonna be smaller buckets that you should be serving in different ways.

And so I imagine somebody—and I, this just comes to mind cause [I interviewed a person recently who is a person who has built a resource for backpackers](#). And he has these amazing recommendations for tools and backpacks and gear, and survival gear and shoes and all these things. But he’s also noticed that his audiences are split, because he has people who are just learning how to backpack for the first time. And they have a certain set of sort of tools that would be perfect for them. They have a perfect sort of, segment of articles on his website that are just for beginners.

He also has people who backpack and do day trips, or two-day trips. And they have a certain requirement, or parameters around what gear they need, and what kinds of strategies and information they should know. And then he has another subset of people in his audience who are taking those like, four to five-month backpacking trips up the coast of California and into Oregon and Canada kind of thing. And that means there's a completely different—you can imagine a set of gear and information and tools and recommendations and maps, and all those kinds of things.

So he is starting to learn how to segment his audience. And he's gotten really excited about using something like RightMessage to do this, because you can understand this information upfront. So, RightAsk, which is built into RightMessage—and you might see this if you go to SmartPassiveIncome.com, there's a little nice sort of popup on the bottom, which acts like a very easy-to-use survey. So on my website, it says, “Hey, have you started a business yet? Have you just gotten your feet wet? Or are you scaling right now?” And then based on that click, it can ask further questions. But already, even if they only answer that one question alone, they are then, through the magic of integration with ConvertKit, tagged as somebody who has yet to start a business.

And now, they are already in that bucket on my list, without even having to self-segment being on that list. So it's really cool. And correct me if I'm wrong, even if a person answers that survey question, if they were to later join your email list, you would already have that information about them.

Brennan:

That's correct. And that's what's actually really cool about this, is that, if they . . . Let's say they get referred to some random blog post of yours today. And you ask them, you know, which stage is your business? And then they close the tab and come back later, say, a week later or a month later—assuming they're on the same computer, and they haven't cleared their cookies or anything like that, if and when they opt in now to ConvertKit, all that info will be synced up.

Pat: That's crazy, dude.

Brennan: We'll remember that, which is really nice for a lot of people, especially if they're doing kind of this multi-touch thing where people don't opt in right away, right?

Pat: Right. Right. And then, to go back to the backpacking example, to stay on something outside of my own website. You know, I can imagine that this person can, for example, after understanding based on those quick survey questions or however he might segment his audience, then even if they aren't customers yet, when those people come back to the website, the homepage, for example, can say something to the beginners specifically: "Ready to start your first backpacking trip? Click here to learn all the resources for that." Or, "Planning your next two to three-day trip? Click here," if they're in that segment. Or, "Gearing up for your six-month trip? Click here," or you know, even just the language on the website can change based on who they are, which is just blowing my mind.

And you have specific applications for, on a sales page, where if there were a product that would serve all of them, the testimonials would be different. I can—the imagery could perhaps even be different. And the headlines can be different, specifically to them. The call to action on the button can be different. And what's cool about what RightMessage does is it's the same page. It's the same homepage. It's showing different messages. You're not creating three different homepages. It's not a software that is similar to like, [Visual Website Optimizer](#) or any of those tools where you actually have to create four different versions of the same page, and then it takes all that traffic and then divides them evenly. No. This traffic all lands on the same page. They are just seeing the messages that are right for them.

Hence, RightMessage. And you can just imagine how powerful that would be. And then also, you removing the things that they don't need to see, either. So, it's like, yeah, so you're showing them the right message, and you're also not showing them the wrong message or the wrong product, or too many things. The application

is just huge.

And so, my team and I, we are just getting goosebumps thinking about the possibilities of what we're doing. And we're already seeing a lot of results. I mean, I haven't checked the latest numbers, but we've had tens of thousands of people just quickly answer those questions at the bottom, which is already informing us with a lot of information about them. About you, all you listening. And it allows us to—to be honest—just better serve you.

And it's just so cool, man. I'm just so stoked on this.

Brennan: If you don't mind me saying so, I'm looking your dashboard now, too.

Pat: Yeah.

Brennan: And in the last eleven hours, you've had fifty-seven people who've answered questions. Thirty-four of those answers have gone up to ConvertKit, across seventeen total subscribers to ConvertKit. I mean, that's just in the last eleven hours. Yeah. You're averaging about a thousand answers a week, which is really good. But what's awesome is that all that data is being sucked up to ConvertKit, so without really you needing to think about anything, right?

Pat: Right.

Brennan: And you know what, I wanted to mention something really quickly about the sales page example. So a lot of people think this is crazy and probably borderline overboard, but one of my course sales pages, so for Double Your Freelancing, has twelve-hundred variations. And that might seem—

Pat: Wait. There's twelve-hundred different versions of the same page, depending on the data that you've collected?

Brennan: Right. Exactly. And what's interesting is, they only took about forty minutes to set up. So it's not like I cloned the page twelve-hundred

times. What I did was, I have, I think it's eight different dimensions. Right? Everything from income range to what kind of work you do, to are you an agency or are you solo, to why did you join the email course. So, I have an email course that leads to that sales page.

So if I—I ask them when they join, “Why are you joining this email course? What does this email course need to accomplish for you?” And then at the end of the email course, I ask them another question. “Now that you've gone through this free training, where are you still stuck?” Right? So let's say that they join the email course, and one of the options that they choose for joining is, “I'm struggling to close proposals.” So they choose that, they type in their email address, and they tell me they're a designer. At the end of the email course, I cycle back. And I say, “I know you were struggling to close proposals in joining this. Hopefully now, throughout this course, you have a better understanding of how to write really good proposals. Where are you still struggling?” And one of the options might be, “I need a framework. I need a system.”

So if they choose that, by the time they get pitched, and this is about a week later, on the paid course, the focus is on, “This is gonna help you deliver a turnkey system that will help you close more proposals for your design business,” right? And that's, I mean, it seems like there's—I mean, if you think about it, there's what, six or seven different types of work. There's three stages. So, having it started, agency, or solo. You know, all these multiplied by each other, I forgot the exact number, but it's twelve-hundred-something possible variations, where what I'm doing, I'm just saying, you know, depending on the kind of work they do, change out these testimonials.

Depending on what they need right now—which is the end of that email course— change the way I describe that offer right before the purchase button. And then the headline is changed, based on why they came in.

So, it's different elements on that page, which is all done visually. So none of this is with code. Change based on these different data points that are all sitting—so I just switched to ConvertKit, so now all sitting in ConvertKit. And when they click from a ConvertKit email, that was pitching them on the course to the long form sales page, all that data from ConvertKit, all that tag and custom field data is being brought over. And they get a one-off page that is specific to them. And the impact on that has been 66 percent more sales through that email course, just by forty minutes of one-time work.

So I'm really happy with that. And that's kind of the thing, that's like the quintessential use case of the product we've built. But I mean, it makes sense when you think about it. Cause if you were selling your course, let's say, to somebody over the phone, you know, I'm talking with you over the phone. I'm gonna, I know a lot about, kind of, what you do for a living. You're in San Diego. I know all these different things that would help me change the way that I position that course to fit you and your needs.

Pat: Yeah. Like, if you went, if instead you were like, “Hey, Pat, how's living in the United States?” And I'm like, “Wait, what?” “I know you're a business owner and you want to get more traffic, right?” “Yes.” “Okay, well, I have this tool for you.”

Versus like, “Hey, I know you're a podcaster, and you wanna get more listeners, and you've tried these things before. But have you tried this?” That to me is like, “Wow. You know where I'm at.” And I think it was Jay Abraham who said, if you can define the problem better than your target customer, I mean, they're gonna automatically assume you have the solution. So this is just a tool to help you do that.

Brennan: So what's interesting, too, we haven't really touched on this yet, is, we talked about surveys. So you're using surveys, both over trigger links in emails and on your website now. There's also a behavioral element to this. So let's say you can set up different segments like designer, developer, marketer, you know, and so forth. But it

can also plug in rules that say, if somebody lands on the “How To Start a Business” blog post of mine from Google, well, we’re gonna automatically put them in the beginner segment. We don’t need to assume they’re trying to scale a business, if they land there first.

So you can look at things like the website that sent them traffic. So, if ConvertKit.com sends you traffic, you can probably assume that the person coming over uses ConvertKit. So we do this. So we integrate with all these different tools, we’re on these different integration directories. We have guest posts we’ve done on these different sites. When Active Campaign sends us somebody from their blog, we don’t ask, “Are you Active Campaign, Drip, ConvertKit, or any of that stuff?” We just assume they’re Active Campaign, cause they came from Active Campaign.

So when they come over, they’re seeing the Active Campaign logo, big, prominently highlighted front and center. And you know, little things like that where you can kind of behaviorally segment people, where, instead of just explicitly asking them—and explicit is a fallback, so if they came directly or something, you would need to ask them, “What do you use?” But sometimes you can kind of guess, based on where they came from or the—and this is another big one, is the ad they clicked on.

So if you’re doing these sort of paid ads, with, say, Facebook ads, you can target, this ad is going to men. This ad’s going to women. This ad’s going to this age range. This ad’s going to people who like this. So, people who like [AppSumo](#) or something, you have a testimonial of Noah Kagan or something, right?

There are so many interesting things you could do, based on looking at, you know, where is this person coming from? And what type of people engage with that kind of ad, or click on a URL from this blog? Like, what kind of people read this blog? And we’ve seen really, really good results from a lot of our customers when they go through their analytics and look at, who’s sending me traffic consistently? And what type of people read these different websites?

Pat: I like that. So, if I had a fitness website, for example, and I talked about all things fitness, from nutrition to weight lifting, to weight loss to running, you know, all those things. If I had a very popular article that was about, sort of, running your first 5K, and I saw where it was coming from, perhaps Google was sending me traffic, like, how to run your first 5K. As soon as people land on that page, we would then—so it would be a rule that if people land on this page from Google, then essentially tag them as a sort of couch to 5K person and have RightMessage show all future information on the website about, sort of, getting started and getting your first few steps.

And then eventually, hopefully, show them a training program on how to just have a really good but easy running regimen, to train you for that.

Brennan: Exactly. And what's nice is it's not about just doing it at that point, at the landing page. So, if they go to the homepage, or they come back days later, you still remember that entry point. And you've segmented them that way, so they're looking at your homepage hero, and now it's all about getting started running a 5K. Whereas somebody who searched for joining an ultra-marathon, they're not gonna . . . Running a 5K is not gonna be that appealing to them. Or, you know, a triathlon or something like that. Right?

You can change it up depending on how they behaved on your own website. And I'm even doing this now where, on Double Your Freelancing, if I have different blogs that send traffic consistently, one of which is a web design blog. And they link people to random article in my blog and that's been there for the last few years. So, people come over from there. I assume they're a designer, if they're reading a design blog.

And then, depending on the type of content they're reading the most of, I group them into what I think they need help with. So, if they're binging articles about proposals and they came from a design blog, when they go over to my homepage or they get hit with an exit popup, or a footer opt-in at the bottom of the blog post, it literally says, "Designers: Find out how to close more proposals."

And it's based on what they're consuming and how I've segmented them based on acquisition, in that case. But they could have also said, "I'm a designer," by clicking on the option in RightAsk and ended up seeing the same stuff.

Pat:

That's crazy. And to some listening right now, it may seem a little complicated still. I would love to simplify this even more. Cause I remember when I first started segmentation, before I learned about RightMessage, it was . . . I was like, "Okay, I'm gonna think of all the different people and buckets and kinds of people in my audience. So I have like, 40 different ways that I could sort of like . . . Okay, what about millennial females? Millennial males. And people who are older, baby boomers who are just getting started. But then, baby boomers who already have a successful business."

And there was like forty different things. And I was like, this is gonna be way too complicated to figure out. And if you were to recommend how to start easily segmenting beyond the obvious one—which is like, customer, not customer—how would you begin to have people understand, well, what are those buckets that they should be focusing on? Is there a specific question we can ask ourselves? Or how do we even know what questions to ask?

Brennan:

Good question. So, in turn, I would actually start with the segments you just talked about; what we do know. Cause the big thing, I think, is a lot of us have a model where we—say we're using ConvertKit. We grow a list. And then we nurture our list by sending them emails. And these emails will often point them to a new article or something on our blog.

The best thing that I think everyone listening should do is, if I am on your list, never show me another opt-in. Right? So if you just emailed me a link to your latest blog post, and I go there, and you hit me with a popup immediately that says, "What's your email address, and I'll send you whatever"—you literally just emailed me, right?

So, I tend to think that that's a really good starting place, is to say, if they're off my—and this is where I started out, to be honest. So the very first thing I ever did, doing this kind of stuff, was subscribers see a push to a product. I didn't go really refined with it, I just said the entry level product. And then, non-subscribers, I wanna get them on my list.

And that was my initial thing. That way I could just email everyone on my list. And then new people, seeing that article, would be incentivized to opt in. And existing people who emailed that article would see a promo for a product or something.

So I'd probably do that. And that's pretty straightforward and relatively quick to do. But to answer your, kind of, the overarching question here, I think the biggest thing that we've seen the best results for are things like, "How can I best help you?" So, you know, instead of . . . People generally ask, you know, "What kind of industry do you work in?" or something like that. You're gonna get engagement, but it's not gonna be huge.

But if you ask somebody, "How can I best help you today?" And, so for instance, on Double Your Freelancing, I'm asking people that. And the options are things like, "I want training on how I can start or grow a business." The other answer is, "I want to augment my skills with new technologies." The third is, "I want community." And the fourth is, "I want one-on-one mentorship."

So if they choose mentorship, what's gonna happen is, if and when they opt in, they're gonna get emails from me that are about the coaching program we offer. Whereas somebody who just says they want self-study business training, they're gonna be put more on that routing, right?

So I tend to find, something—and this is huge, especially if you have a portfolio product. So let's say you have a self-study course, and then you have a group coaching platform. And then you have something else. Traditionally, I would say it's better to route people to the lower-priced course first, and then upsell coaching later. But

I would also try to think through, well, if they want coaching right now, maybe you could kind of short circuit them to the coaching product.

So I tend to find asking people, “What is it you need from, like, what is gonna make it worthwhile to stick around and to hear from me?” And one way that I’ve done that is when somebody opts into my email list, have a little P.S. that says, “Hey, in two or three sentences, could you reply and tell me a bit about who you are, and what you’re looking to get out of joining my list?” let’s say. And you just get a lot of, you’ll start to get email replies to that. Some of these will be multi-page novels, right? But some of them will be pretty quick.

And over time, you can start to kind of read between the lines and see, “Well, a lot of people are struggling with this. So maybe I can kind of—I’ve seen these three or four different themes.” And I can now go and replace that P.S. with trigger links, that say, “Which of these three or four are you?” Or with a survey of my site, that says, “Which of these three or four are you?”

And that’s typically where I would start, is by having something more open-ended. And then, once you get data back, to try to distill that down into a few core segments.

Pat: And then to add to that, really pay attention to the language that they use when they send you those replies. Because essentially, your messages on your website to that particular audience, for anybody who visits your website or sees your future emails, new or old, you would wanna use the same language. Because that’s what they resonate with. That’s how they’re sharing that information back to you.

Brennan: Exactly. And that’s gonna—you’re exactly right in that, and that’s gonna be . . . So, say you find out, let me come up with . . . Say the three options you come up with are A, B, or C. And the A people use the word cat, the B people use the word dog. Again, this is a crap example, but it illustrates the point. So the A people keep saying cat. The B people keep saying dog.

So, when you start to segment people into A or B, when you start to think, “How do I personalize the headline of the sales page for A people or B people?” well you, like you just said, you have, you kind of know. Right? You’ve been getting raw language that you can kind of effectively throw back at their face. So when they get to some sort of call to action or offer, you can show them that, “I get what A’s need, because you’ve told me.” Right?

And that’s a skill in itself, I think, is to be able to kind of normalize that data into these different data sets. But once you start to do this—and it should be a regular thing, right, that you are constantly revisiting what are people saying. This is why I love an email course, is to have open-ended worksheets that you give people, that are a hosted form that asks them to apply what they just learned. Right? And then, they get a copy of that when they click submit. But you get a copy, too.

And I’ve got about sixteen-thousand worksheets filed away in a folder in my inbox, that sometimes I just like to kind of browse through, and see what are people saying. How are people responding to the, “Why did you join this email course?” And I have structured ways, too, of asking them so I can properly segment them. But I do like that open-ended, raw text input, so you can get the actual language that people are using.

Pat:

You know, I often teach like—and my books are about removing the guesswork, and let’s have our audience tell us, essentially, what they need, and let’s better serve them. And I think I’ve done a good job of doing that without tools, but, and so this is possible to do without tools. It takes a lot more manual effort and work, and a lot more, just, conversations. But using tools like RightMessage can allow you to sort of automate this process, so you can get to the data faster, and better deliver and better serve your audience down the road.

So what I love about RightMessage and personalization and understanding, and asking these kinds of questions, is just, it just removes the guesswork for me. And stacks the odds, if you will, in

my favor.

Brennan: Yeah. And you can ask, I mean, you can quickly . . . You're at the point where you can ask a new question with RightAsk and within probably a few days you'll have an indication of how people are being segmented, right? So you could ask, "What would you like to see more of on SPI in 2019?" And you have three or four things that could be kind of gut-level guesses about what you've heard from random people. But you could get statistically significant data about what people actually need from you, relatively quickly, by throwing up a survey like this and just letting your natural site traffic kind of provide that data to you.

Pat: That's awesome. So hey, you know, a lot of people are likely very excited about using RightMessage and getting their hands on it. And just testing out how it works. Do we have a special kind of thing for everybody who's listening here on SPI, that they can get access to?

Brennan: We do. So if you go to RightMessage.com/spi, you're gonna get two things from that, one of which is you're gonna get an extended trial. So we're more than doubling the trial length. [Full Disclosure: As an affiliate, I receive compensation if you purchase through this link.]

Pat: Thank you.

Brennan: The second is we, you just reply to that first email you get. Say you came from Pat, and we, someone from the team will be happy to jump onto Zoom screen share with you, walk through your website, walk through kind of—and help you figure out your segmentation. And will help you get—basically it's screen-shared onboarding, is what we're gonna be offering you guys.

Pat: That's huge.

Brennan: So, we typically don't do this. We typically charge for that. But we know that this is kind of new training for a lot of you, so we wanna

make sure that . . . We know how effective this is. This is better for you, but it's also better for your now and future customers. Cause people don't want to need to think through, how does this actually benefit me. You can directly tell them, this is how this product, or this offer, will benefit you. And people want that, I think. People don't want to need to, kind of, apply what you're saying—which is, if you think about it, most sales copy's common denominator, trying to speak to everyone. If you can be more direct, people are more confident that you can help them, because you can show them how you can help them.

So we'll jump on a call with you. We'll spend as little or as much time as we really need to figure out that strategy with you and get you all fully set up.

Pat: That's insanely generous, Brennan. Thank you and to your entire team for stepping up to do that for Team Flynn here, and everybody who's listening.

And so, the URL one more time, please confirm: RightMessage.com/spi. *[Full Disclosure: As an affiliate, I receive compensation if you purchase through this link.]*

Brennan: Right. And you're gonna see personalization in action when you go there. So what we're gonna do, is as you move around the site, you'll probably see little pictures of Pat around the site. And more of a focus toward Pat, pretty much, like the needs of your audience, the types of people who listen to you.

So this is another example of that. So if you go on a podcast, let's say, you can set up these links that will make it so as you move around not just that landing page, but the whole site, the pricing page, the signup page, and everything, you will be able to kind of continue that theme.

Pat: Yeah. That's insane. That's insane. The application is just insane for a tool like this. So, RightMessage.com/spi. And to finish off, one of my favorite things that allows me understand I'm doing things the

right way, is when I hear comments and responses to my content that sounds like this: “I feel like you made this just for me.”

And that, I get goosebumps when I hear people say that. And it happens after podcast episodes. It happens in responses to emails or when I meet people in person. It’s just, it shows me that I’m resonating with them, right. And a lot of that is because the content is useful. But a lot of it is also just the understanding of knowing where that person is and connecting the dots for them.

And so, what I love about this tool and what you’re allowing us to do now with it, is we are now more easily able to receive messages like that. “I feel like you wrote this just for me,” with just a little bit of, almost like, hacking the website, in a way, to make those connections that are sometimes not obvious. And when you can better personalize information on the web for people, I mean, people are looking for people who understand them. That’s really the truth. And you can do that, and showcase how you understand them, with RightMessage.

So, Brennan, thank you so much for coming on, man. I appreciate you and your team for doing what you do. I have the similar feelings to . . . I remember when I first announced making [the switch from Aweber to Infusionsoft to then ConvertKit](#), and just, the excitedness I had about that tool and its capabilities for my business and everybody else watching and listening, was . . . I have the exact same feelings right now. And I know this is gonna be a big game changer for a lot of people and their businesses.

This could be the answer for a lot of people, too. So thank you.

Brennan:

Yeah. And you know, to kind of give a little tease about the future, we’ve actually partnered with ConvertKit on—cause Nathan is one of our investors—on doing a full-blown course on advanced automation and personalization with ConvertKit and RightMessage. So something to keep in mind. That’s gonna be a few months down the road, but it’s something we’re working on now.

Pat: That's awesome. Brennan, thank you so much. And looking forward to chatting with you again soon.

Brennan: Awesome. Thanks, Pat.

Pat: All right. I hope you enjoyed that interview with Brennan. The link to go to get your extended free trial plus some good stuff there is RightMessage.com/spi. One more time, RightMessage.com/spi. *[Full Disclosure: As an affiliate, I receive compensation if you purchase through this link.]*

And you know, I don't usually go hard on these episodes with telling you about tools. Yes, I tell you about tools all the time, and people behind them and all those sorts of things. But you could probably hear in my voice—rarely do I get this sort of excited about a tool. And it's because it is very exciting for us on my team, and it's very exciting to know that, by sharing this with you, and giving it a shot, you're gonna get some results. And it's gonna be extremely helpful for you and your business, in helping you better serve your audience.

That's my job here, is to help you learn how to better serve your audience. And sometimes, like I said earlier, sometimes that's strategies. Sometimes that's inspiration. And honestly, sometimes it's just tools. And this is an amazing tool. RightMessage. RightMessage.com/spi.

So I hope you'll at least check it out. Again, free trial, no obligation, that is an affiliate link. So just keep that in mind. I do get paid a little bit if you choose to stay with it after thirty days, but, wanted to be upfront with that. But it is a tool that I'm using. You can see it being used right now, if you haven't already answered the questions when you go to SmartPassiveIncome.com. And as you know, that tells me more about you so that I can give you better things and help you out even more.

So hopefully this episode was helpful for you. Game changing for me, for sure. Hopefully game changing for you.



I appreciate you so much, Team Flynn, you're amazing. And if you haven't yet done so, please [subscribe](#) to the show, because we have a lot of great content coming your way. The next episode, I'm really excited because it's with a person who I got to know last year: An amazing woman with an incredibly large brand, and probably one of the biggest fan bases I've seen. And it'll be fun to chat with her about business, all things business.

So, hit [subscribe](#). Check that out. Until then, Team Flynn, you're amazing. Thank you so much. I appreciate you. Team Flynn for the win.

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