

# GET MORE LEADS & SALES BY CHEATING THE TRADITIONAL SALES RESEARCH PROCESS

How to use a free and simple Google Sheets trick and the **SIP personalization method** to save hours of research when personalizing cold emails



# The Problem...

- Effective sales outreach requires personalization
- Effective personalization requires time & effort

# The Solution...

- Use the Excel / Google Sheets IF function
- Simplify the research process by auto-populating consequences of your research
- Outsource the research (optional)

# Here is how...

## Step 1:

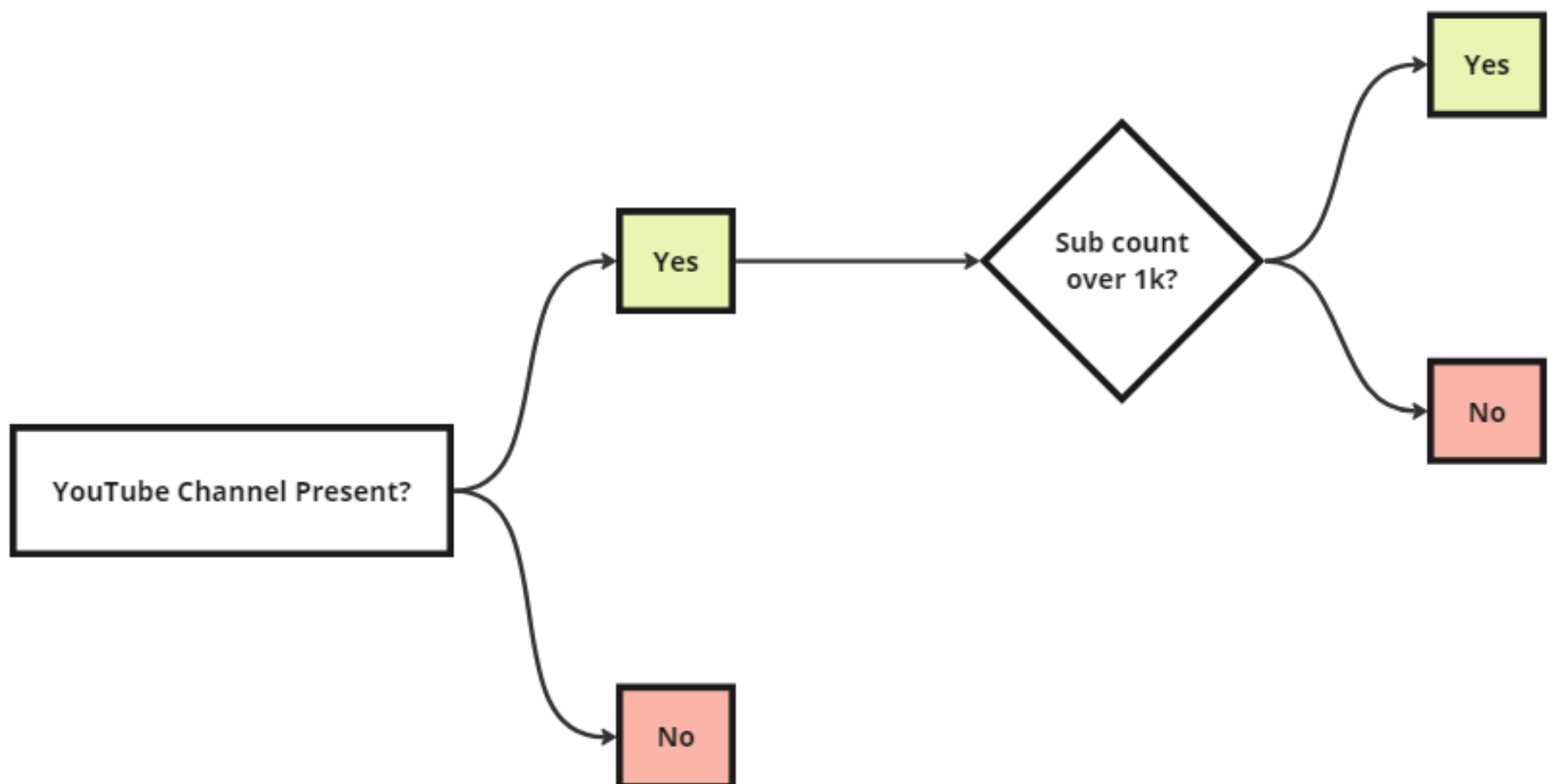
Identify all the areas you will base your research and personalization on.

## Example:

You are an agency helping consulting businesses to launch their own YouTube channel.

# ...and you will research

- If the target account has a YouTube channel
- If yes, is the subscriber #
  - Above 1,000?
  - Below 1,000?



# Step 2: The SIP Method

SIP stands for **Situation, Implication, Pitch.**

Create sections or outlines of your cold email for each element of SIP and for every research scenario:

	Situation	Implication	Pitch
No YouTube			
Below 1K			
Above 1k			

Don't worry, you can always adjust this later!

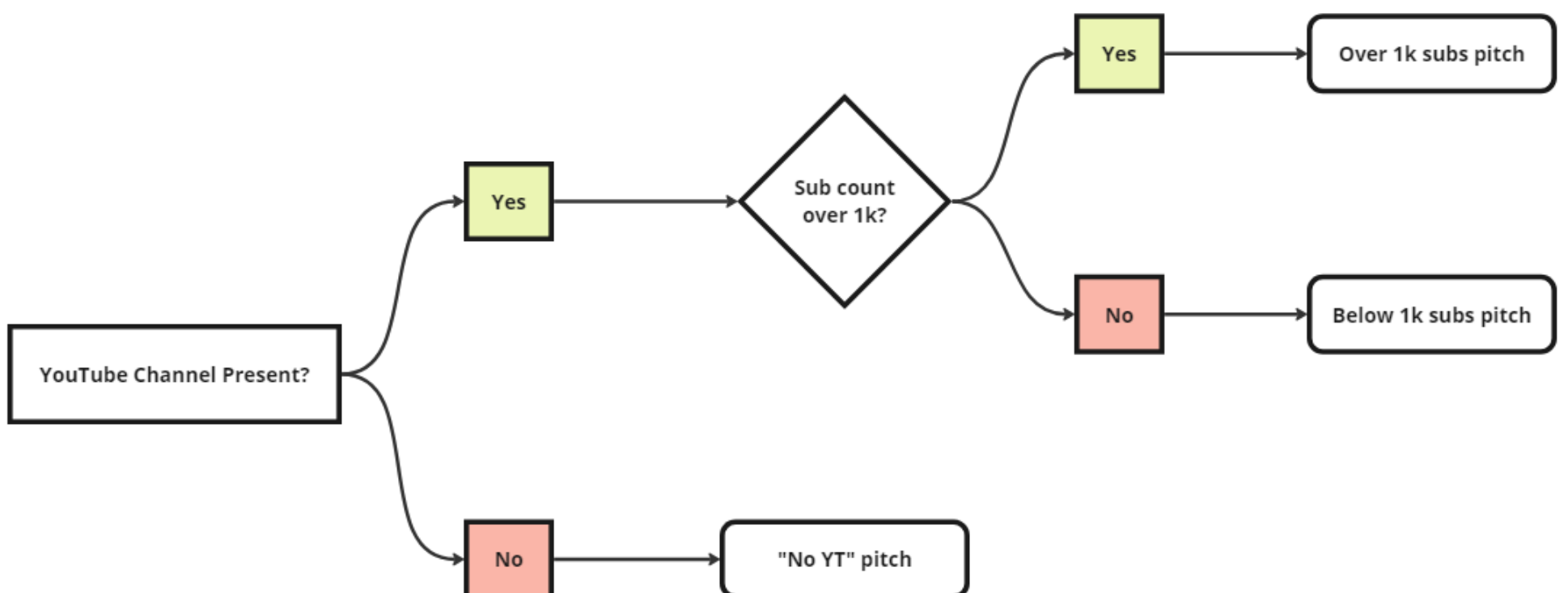
# Step 2: The SIP Method

## Example for "No YouTube":

- **Situation:** "you don't have a YouTube channel"
- **Implication:** "YouTube has been one of the best growth levers for agencies in 2022"
- **Pitch:** "I'd like to share with you our roadmap for launching and growing agency YT channels to 100+ subs in just 30 days or less"

# Step 2: The SIP Method

This way, we will be able to customize the cold email and the pitch for every prospect based on their situation:





# Step 3: Building the IF function

## Step 3.1:

Create a dropdown in Google Sheets with your 3 predetermined research outcomes and create new SIP columns:

The screenshot shows a Google Sheets interface with a dropdown menu configuration panel on the right. The spreadsheet has columns G through L. Column G is labeled 'YT Research', H is 'Situation', I is 'Implication', and J is 'Pitch'. Column L is currently selected. The dropdown menu configuration panel shows the following settings:

- Apply to range: Sheet1!G2
- Criteria: Drop-down
- Criteria 1: No YouTube
- Criteria 2: YT Below 1k
- Criteria 3: YT Above 1k
- Buttons: Add another item, Advanced options

# Step 3: Building the IF function

## Step 3.2:

Create a new tab (call it "Input") and enter your SIP values, i.e. what will go inside your cold email

	A	B	C	D
1		<b>Situation</b>	<b>Implication</b>	<b>Pitch</b>
2	<b>No YouTube</b>	Situation for No YT	Implication for No YT	Pitch for No YT
3	<b>Below 1k</b>	Situation for Below 1k	Implication for Below 1k	Pitch for Below 1k
4	<b>Above 1k</b>	Situation for Above 1k	Implication for Above 1k	Pitch for Above 1k
5				

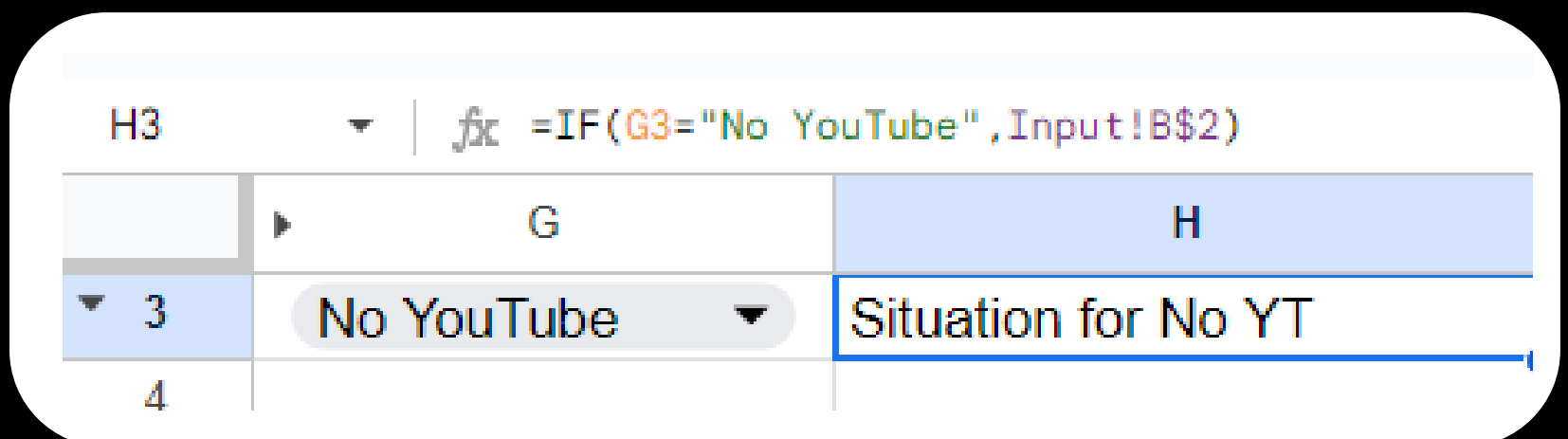
# Step 3: Building the IF function

## Step 3.3:

Building the IF function is easy, and ChatGPT can now do it for you! But here is how to do it manually:

We start by creating the formula for one Situation - "No YouTube"

```
=IF(G3="No YouTube",Input!B$2)
```



The screenshot shows an Excel spreadsheet with the following data:

	G	H
3	No YouTube	Situation for No YT
4		

**We are saying:** "If value of G3 is "No YouTube", fetch data from cell B2 in the Input tab"

# Step 3: Building the IF function

Then, we can expand the formula to all *Situations*:

The screenshot shows an Excel spreadsheet with the following data:

YT Research	Situation	Implication	Pitch	
YT Below 1k	Situation for Below 1k			

The formula bar displays the following formula: `=IF(G2="No YouTube",Input!B$2,IF(G2="YT Below 1k",Input!B$3,IF(G2="YT Above 1k",Input!B$4)))`

# Step 3: Building the IF function

When building the formula for *Implication*, we can just change the cell we want to fetch data from - i.e.:

- Input!B\$2 to Input!C\$2
- Input!B\$3 to Input!C\$3
- Input!B\$4 to Input!C\$4

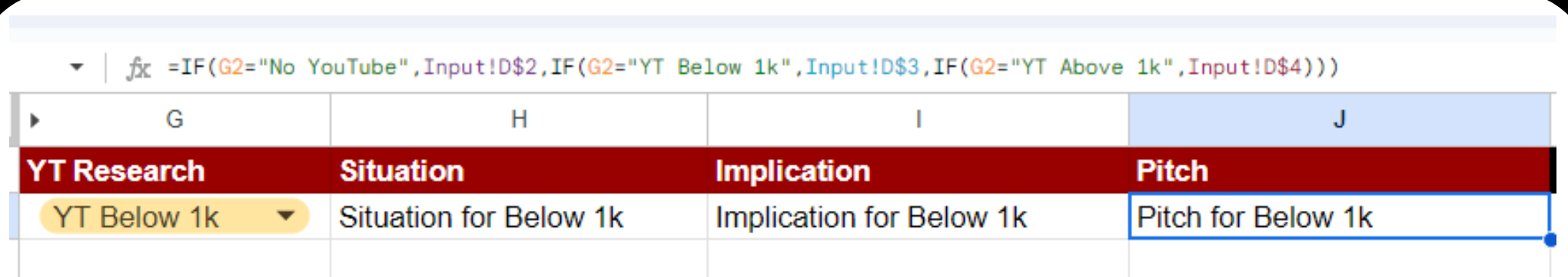
fx =IF(G2="No YouTube",Input!C\$2,IF(G2="YT Below 1k",Input!C\$3,IF(G2="YT Above 1k",Input!C\$4)))

G	H	I	J
YT Research	Situation	Implication	Pitch
YT Below 1k	Situation for Below 1k	Implication for Below 1k	

# Step 3: Building the IF function

...and we will repeat it again for *Pitch*, by changing:

- Input!C\$2 to Input!D\$2
- Input!C\$3 to Input!D\$3
- Input!C\$4 to Input!D\$4

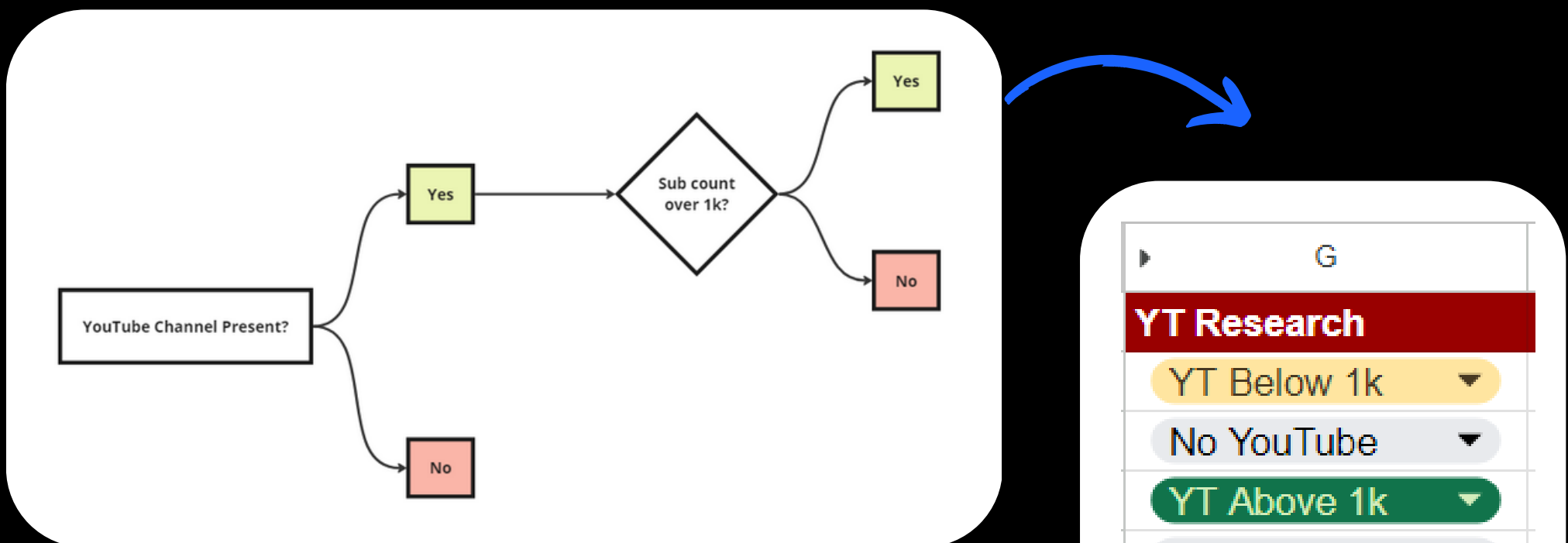


The screenshot shows an Excel spreadsheet with a formula bar and a table. The formula bar contains the following nested IF function: `=IF(G2="No YouTube",Input!D$2,IF(G2="YT Below 1k",Input!D$3,IF(G2="YT Above 1k",Input!D$4)))`. The table below has four columns: G (YT Research), H (Situation), I (Implication), and J (Pitch). The first row is a header with a red background. The second row shows the results of the IF function based on the selected value in column G.

YT Research	Situation	Implication	Pitch
YT Below 1k	Situation for Below 1k	Implication for Below 1k	Pitch for Below 1k

# Step 4: Cold Outreach

Now, when doing research, we have a simple decision tree and only 3 research points to consider...



...making this process easy to outsource

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G	H	I	J
YT Research	Situation	Implication	Pitch
YT Below 1k	Situation for Below 1k	Implication for Below 1k	Pitch for Below 1k
No YouTube	Situation for No YT	Implication for No YT	Pitch for No YT
YT Above 1k	Situation for Above 1k	Implication for Above 1k	Pitch for Above 1k
No YouTube	Situation for No YT	Implication for No YT	Pitch for No YT

# Step 4: Cold Outreach

We can add additional "merged fields" for more customization into our Google Sheet, such as:

- Their industry
- Our clients similar to them, for social proof
- Our results in their industry



# Step 4: Cold Outreach

The last step - use a cold outreach tool such as [Lemlist](#) that will populate the email template with data from our Google Sheet:

Hi {{firstName}},

I noticed that you {{situation}}.

After helping more than 25 {{industry}} agencies in 2022 (such as {{client1}} or {{client2}}) to {{result}}, we noticed that {{implication}}.

Based on that, {{pitch}}.

Does {# "now" | date: "%s" | addWorkingDays: 2, "6,7" | date: "%A" #} work to discuss this?

{{signature}}

# That's it!

I share similar and more in-depth, no fluff sales strategies via my free newsletter.

Go to [yantle.com/newsletter](https://yantle.com/newsletter)

(Link in the post)