How to Capture Resellers off Competitor's Online Databases

1. Read this ENTIRE list FIRST before you start any of the steps and do not skip anything!
2. Make a list of your competitors (primary and secondary)
3. Find the competitors website
4. Find their reseller database. Here are typical locations:
    a. About us/Reseller (or partners)
    b. Purchase/Resellers (http://www.filemaker.com/purchase/resellers/)
        i. Be careful. Some list their major resellers (like this link) on the top level of the database. This is NOT all! These are only about 10 showing in the example--they have over 700 hundred.
        ii. Choose country or other criteria. Keep digging around this area and you will usually find everything.
    c. Partners (http://www.filemaker.com/purchase/resellers/)
        i. Find a partner. Some sites require you to register to get their resellers. Use a new generic (john22@gmail.com, etc.) e-mail you create for this.
    d. Search for the company name and reseller/partner. Be *methodical*.
5. Systematically copy their resellers
    a. Manually. You will highlight the reseller info (ALL you can get--including certifications (knowing their Gold vs. Silver, etc. is very valuable--these are the top) and copy it into a spreadsheet. Usually just highlight the name and drag the highlighted region (no need to select copy) into your spreadsheet.
    b. Software. Egrabber works. http://www.egrabber.com/
6. If it is zip code based, Google for a zip code list by state and input these into their system. Check off EACH zip code so you make sure you grab their entire database.
7. Do this competitor by competitor to complete the spreadsheet. To buy a list with these names cost from $2.00 to $50 each, so they are valuable. Plus, the avg reseller might sell over $50,000 of product for your company--so think of picking up thousand dollar bills with each name you compile.
8. Stop at 500 (or at a logical stopping place) and then start the prospecting e-mail as a first batch--then you can go back to the capturing process again later.
9. Clean the spreadsheet (follow the detailed instructions below--do NOT miss a step):
    a. Remove duplicates. Excel has a de-dupe option but it is deadly (the wrong selection will kill a LOT of good names). You can try, but test first. I recommend you sort the database by multiple categories. For example: Company name (but some resellers have multiple offices), then website, then phone, then address, then last name.
    b. Remove all commas. Some databases require we import using a "comma delimited" format (meaning it uses a "," to separate the fields). If we have commas in our data it will put the wrong info in the wrong field. I would highlight the entire database (click the top left corner) and do a replace with a semi-colon ";".
    c. SAVE your database with a new name (reseller1, reseller2, reseller3) after EVERY major action so you can go to a prior version if you mess up the spreadsheet (happens a lot).
    d. Clean up the URLs. Everyone of them should ONLY have this format (www.website.com). Exceptions: it could end with .org, etc.
        i. Remove the http:// from the front (replace it with a www if possible). Also check for other prefixes, like https, etc. and remove them.
        ii. Check for any resellers that have more than one / in their URL. (Example: www.reseller/nz/auckland/). If so, you will need to remove the middle / first. You will need to do it manually. There are formulas that can remove the middle ones and everything thereafter on the line, but it would typically take longer to learn it than to do it by hand.
        iii. Then do a search and replace to remove any "/" from the back of any of your URLS (Example before: www.reseller.com/ after: www.reseller.com)

iv. If a website has *anything* other than www.companyname in front of it, i.e., "partners.yourwebsite.com", the remove it.
v. Note: when you are cleaning a particular column, it may help to resort the entire list by the column (make sure you first highlight ALL the rows/columns first (click on the top left corner)) so it puts all the inconsistencies next to each other. Sometimes you will then highlight JUST the entries with the wrong info and do a search/replace.

e. Sort the entire database by first and last name. For those records that are missing this information, then do a search/replace for all empty and replace the FIRST NAME ONLY with **Sales Manager.** We will be sending our e-mails to the person listed as the first name and this will at least get it to the sales manager if we don't have a name.
f. Don't worry about adding any missing titles since we will typically address them by first name.
g. Sort the spreadsheet by e-mail. Create a second column called e-mail2. For JUST those blank e-mails you will copy the URL to both columns (ie., www.company.com). Then do a search/replace for just those e-mails and replace the "www." with "Sales@" for one column and "info@" for the other column. So you will now have two e-mails, one for sales and the other for info (the two most common e-mail locations). (Example: www.reseller.com will turn to info@reseller.com and sales@reseller.com)
h. Sort the database by phone numbers. They all have to be consistent. Some will have (xxx), others a dash "-", and some will have spaces between the (xxx) phone number. Remove all the leading 1's for 800 numbers (not for international numbers). Move all the Extensions to a separate column.
i. Clean up addresses, get rid of comma's, etc. Move suites to separate column.
j. Sort by city and zip and make sure all the same cities are spelled the same.
k. Sort by state and make sure they all have the same abbreviations (i.e. CA versus California).
l. Sort by city, state and zip. Compare zips to ensure that everyone has a zip code. Otherwise, put similar codes in the space. Look for missing digits. Don't worry about international.
m. Sort by Country. Put any state, etc. info for international back under country.
n. Remember: Save each database (rev 2, 3, etc.) before each major phase.
o. Make sure you capture the source (where you got the name from)
p. Pre-level - this is the resellers certification that you should have captured. This is critical info--since we definitely want to know who the best resellers are (platinum vs. authorized means they do more volume).
q. Type refers to the type of reseller. Retail, VAR, Distributor, SI (system integrator). Capture if it is available. By default they would be VAR (so fill in any missing info). We must have a type before we import.
r. Group. Some CRMs like Salesforce can only e-mail 250 names in a batch. So, we will divide our database into batches less than 250 and give them a group name.
s. Status. They all come in as NEW. Copy the word "new" into the entire column.
t. We will keep any other info you obtained and decide how to deal with it later.
u. FINAL review: Look for any odd spaces (in the front or middle) or anything odd and fix it so it is consistent. It is a royal pain to do it within a database once imported, vs a spreadsheet where you can see it easily.
v. The data must be clean and consistent.

10. Setup your database for "campaign management". You will send 3 e-mails to different batches and will need to keep track of who has and has not gotten them.
11. Import your names into your CRM. Salesforce can only do batches of 250 names at a time for the Pro version and 500 for the Enterprise. Check out others like items, leadmaster, etc.
12. Create the recruiting e-mails. See the Chanimal template samples.
13. Send first batch. Followed by #2 and #3.
14. Rinse and repeat

Email Systems & Mass Emails (*READ!*)

Customer Relationship Management (CRM) - Desktop

Sometimes you can use your CRM to send out mass emails. Some desktop apps will allow unlimited number of emails (i.e., Goldmine, etc.). You can send large email campaigns (including your own monthly customer newsletter (sometimes to hundreds of thousands of customers)) easily if you have your own server. However, there may be email volume limits if you are using an ISP.

Internet Service Providers (ISP) or Hosting Service

If you are going to send from your personal computer and use an Internet Service Provider (such as Time Warner (now Spectrum)) to send emails, they will usually have a limit on your account to reduce the number of total emails per hour--the same is true if you use a self-hosted CRM or email software that resides on an ISP (such as BlueHost, GoDaddy, Gator, etc.). If you contact them they will sometimes remove it, but they will usually raise the limit—so you'll need to know the maximum number of emails per hour so you can set this parameter in your software (some CRMs have the option, most dedicated email software has it).

You should always be careful with emails sent from your *own* URL (whether you have a direct connection or use and ISP), so your domain name reputation is not harmed (put on a global black list by crowd-sourced anti-spam apps (the more people who click your email and classify it as spam, the more they block you from *everyone's* list). So you should **only** use your own URL for an internal, or *verified* double-opt-in list that should have up-to-date information for fewer bounce-backs and there is less chance recipient will report you for spamming (if they do and it is verified double-opt in, you can be forgiven and your ISP will turn your system back on—but clean them out so you don't get in trouble again).

You will want to create a NEW URL that you will use JUST for large email campaigns. They are so cheap ($5.95 to $9.99). Then if it gets blacklisted, you can start another campaign with another new URL. www.partners-YourCompany.com.

If it is an older database that you have not used for a while and may have a lot of changes (even if recipients double opt-in originally), you may wish to use an email *cleaning* service first, remove the bounce-backs and then use the list as normal.

Email List Verification & Validation Service

Following are a few review sites that list several of these cleaning services along with their rates:

- Top 10 Bulk Email List Verification Services. Review, plus general pricing.
- 10 Best Email List Cleaning Services. Review site.

CRMs – Web-based (SaaS)

If you use a web-based or SaaS CRMs (like Salesforce) they will usually limit the number of emails per batch, day or per month. For example, Salesforce Pro only allows 250 emails per batch—so you would have to divide a 10,000 person list into 40 groups—which is prohibitive. Other CRM's may have higher limits, but they also regulate the kinds of lists you can use (since they don't want their general URL to get blacklisted).

Email Services - Double Opt-In ONLY

All of the popular email services (like iContact, Constant Contact, Mail Chimp, etc.) require double opt-in list or they WILL shut you down (or slow your sending rate) if they get too many bounce backs, opt-outs or spam reports. If you have a clean, double opt-in lists, then you can use these services. However, many of the lists you receive, including a generic reseller database, have some opt-in and others were pulled from competitor's websites. Some of the emails are accurate, and some are old (especially those with the individual's name—versus sales@ or info@). As such, you should ***NOT*** use one of the popular email services—you WILL be shut down (certainly if you do not clean your own or the generic database first. For these lists, you will need to use an email service that does not require double opt-in.

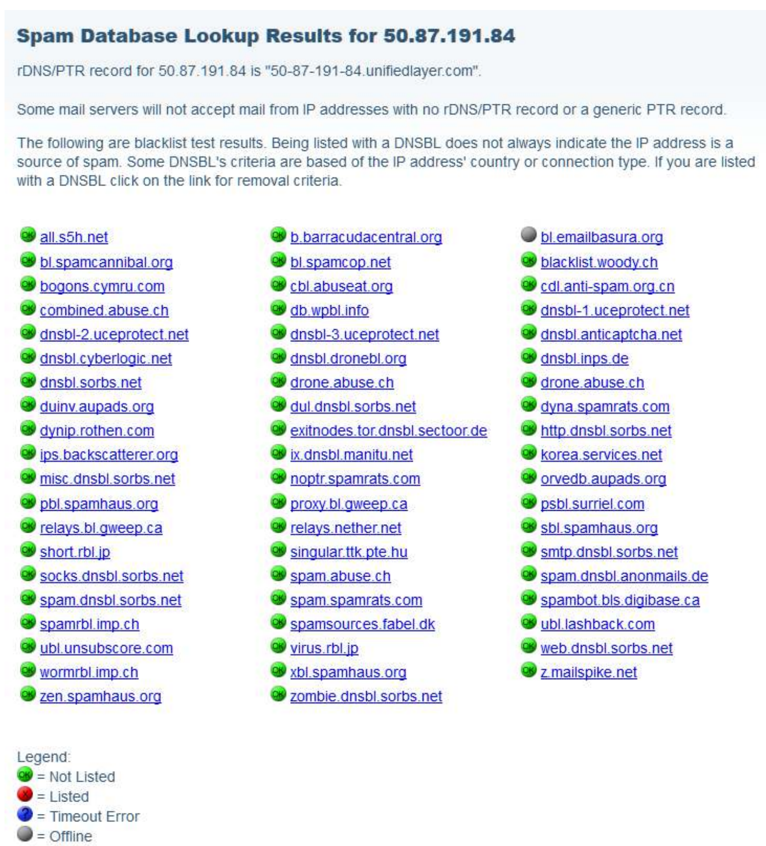
Email Services – No Double Opt-In required

There are several email services that will help you with mixed lists. Even still, they may still have a double opt-in requirement, but they don't enforce it unless the lists get out of hand. If you pre-clean your lists, you shouldn't have a problem. These companies will usually setup a dedicated domain for these campaigns (either new or an existing that you provide)—this way it can be turned off and replaced if for any reason it gets blocked. You also want to ensure you are not using an IP address from one of these companies that is ALREADY blocked (it happens) or your perfectly good list may be blocked from someone else's bad campaign (these are questions to ask your provider).

Here is a location that checks multiple DNS blacklists (you will need to ask for the IP address—or you can Google for it once setup):

- Dnsbl.info – checks the blacklist status of your mail server's IP address on more than 100 DNS blacklists.

Here is what you would LIKE to see:



I have used numerous non-opt-in sites, but I recommend **jMailerPro.com** (say they "allow purchased lists" and it can also be used to clean your email list). It usually takes a day from the time you sign up before they have the system and the domain setup. You will also want them to increase the emails per hour. If the hourly email rate is low, you can setup an automatic schedule to run the campaign (during work hours is best—higher open rates) over a few days (depending on how big your list is). Another to consider is **Mail250**—a lot more emails per hour (1,000 – 5,000).

CRITICAL: Make sure you include yourself and a few other team members on EACH and every email batch—even if you send 3 emails to the partner. This way if your service has gotten onto a black list, then your emails will go to spam. An INSTANT indicator you have to change the domain name used to send them (and NEVER, EVER use your main company domain name for emails (even if double opt-in).

Spray and Pray

There are two types of list 1) highly qualified (even competitors) and 2) general. It is fine to send your campaign to a general list (even if not highly qualified) if you have a product that appeals to a large group. However, if your product is "genome research software" that might only apply to 1% of the entire list, then it is best to avoid a spray and pray approach and just send to a very targeted group.

Is It Spam?

Yes or not--depends. Anything not relevant, wanted, annoying or too frequent can be considered spam (even to a double opt-in list). Sometimes it is defined as *unsolicited* and *bulk*. If the prospect *may* want the item or offer, then they usually don't consider it spam (I like getting emails about bikes, video products, legitimate deals for consumer electronics, etc.).

The real question—*is it legal?*

There is only one USA law regarding SPAM and it doesn't differentiate between B2C or B2B. In addition, only an opt-in lists doesn't require identifying the email as an ad (body of the copy or otherwise)—but everything else is the same (so be aware). Here are the top seven rules:

1. **Don't use false or misleading header information.** No phishing or changing from.
2. **Don't use deceptive subject lines.** The subject line must accurately reflect the content of the message.
3. **Identify the message as an ad.** You must disclose clearly and conspicuously that your message is an advertisement.
4. **Tell recipients where you're located.** You must include a valid physical postal address (street address, a registered post office box, or a registered private mailbox). This *STILL APPLIES* even to an opt-in list!
5. **Tell recipients how to opt out of receiving future email from you.**
6. **Honor opt-out requests promptly.** You must honor a recipient's opt-out request within 10 business days.
7. **Monitor what others are doing on your behalf.** You can't contract away your legal responsibility to comply with the law.

BTW, you CAN send unsolicited emails to a non-opt-in list—but you must follow the rules for it to be legal (we all hate the emails that do not (no address, deceptive, questionable opt-out—and a barrage of the same emails).

One-on-one emails that are not unsolicited or bulk do not appear to have the same rules (not as much detail available)—but they *could*. Follow the rules above regardless, just to be safe ($40k + penalty is not cool). I would include your address in the *signature* you use for this type of email and you may be also be fine using a simple line, "P.S. If you aren't the right person to contact about this, please let me know," as the personal email opt-out notice.

See more at the Federal Trade Commission. These are only the **USA's** rule, other countries may have different regulations—so be aware.

Check for Spam

There are websites that you can test your email to see where it might raise a red flag. The sites seem to come and go, so just type "Check email for spam" and you'll see several free or trial sites you can use. Make modifications that make sense. You can't make all the changes or you won't have an email, but some are fine. Most systems will give you a 1-5 rating (our typical recruiting email is usually about a 1.5 so is relatively safe).

Best Time to Email?

There are several studies, but the most common answer for B2B is business hours, usually an hour after they have cleaned out the night's spam.

You will want to check your email service to find out how many emails per day—but more so, how many per HOUR. If you email in the US, you will want to hit the west coast no sooner than 8 am (11 am east coast) and you want to shut off at 4:30 pm on the east coast—so this only gives you a 5 ½ window. So, either break your list by time zones and send during their best times, or you send batches within this window.

Send ID

Who the email is sent from affects open rates. There is a higher open rate and lower reject rate if your email is sent from Channel Manager vs Partner Program, etc. Also, gMail accounts typically work better—but they only send 500 at a time—so it can take 10 days to send 5,000

How to Setup Your CRM Database

Following are the steps to import a spreadsheet database into your CRM/Contact Manager:

1) Clean and prepare your spreadsheet data.
   - ☐ Remove any duplicates (same address, not same name). Should already be done--but double check.
   - ☐ If you have multiple locations for the same company then put an * next to headquarters.
   - ☐ If the multiple locations all have the same (sales@company.com)e-mail, then delete the duplicates e-mails (not the locations) until you get a unique e-mail addresses per location.
   - ☐ Put the labels for each field on the TOP of the spreadsheet and use common descriptions:
     - ☐ Company
     - ☐ First Name
     - ☐ Last Name (the program can combine, but put in separate fields whenever possible)
     - ☐ Title
     - ☐ Phone
     - ☐ Phone2
     - ☐ Fax
     - ☐ Email
     - ☐ Email2
     - ☐ Address1
     - ☐ Address2
     - ☐ County (rare)
     - ☐ City
     - ☐ State
     - ☐ Zip
     - ☐ Country (needed when your master database is world-wide (do a copy paste to put all the countries in if needed))
     - ☐ Website
     - ☐ Email Link (link to their e-mail form on their website (for those that have no visible e-mail)
     - ☐ Source (i.e, Microsoft, HP, Adobe, etc. for the lead)
     - ☐ Pre-Level (authorized level from your source (helps know which sold a LOT vs little)
     - ☐ Company Type (Customers, Lawyer, Reseller)
     - ☐ Reseller Type (VAR, Consultant, Affiliate, Distributor, Retail, etc.)
     - ☐ Group (each batch of imports will be given a different group name (i.e., 1, 2)
     - ☐ Status (NEW – all names are imported with a NEW status, which will change as you take them through the campaign (NEW, Email1, Email2, Signed, Orientation, etc.)
   - ☐ Clean database (items below should be done (above), but be sure to complete the following:
     - ☐ Clean all Phone numbers and ensure consistent usage (801) or 801-555-3241, etc. Remove any spaces (consistency for the import to work cleanly)
     - ☐ Clean all addresses and make sure the address only contains the street number (not street, city and state, etc. on one line)
     - ☐ If you don't have a contact name, then use "Sales" "Manager" as first and last name.

- ☐ If you don't have an e-mail, replace the "www." from the company website (www.company.com) with "sales@" and another copy with "info@" this will give you some chance of guessing their e-mail.
- ☐ Make sure all addresses have states and they should only be the standard two-letters. Resort all rows by phone number to use area codes to match states if you are unsure.
- ☐ Global: Remove all comma's (",") since many imports use commas as field delimiters. Replace them with another character (semi-colon works ;)
- ☐ Remember to add the source where you captured the name, plus add a group # (each time you import a list, that group starts a new campaign—so change the group # each time you import a new list), add type and status.

- ☐ Database decisions. You will have to make the following decisions:
  - ☐ Do you combine your new reseller leads with existing resellers, or do you use a separate database?
  - ☐ Do you put all resellers in with prospects? How about customers?
  - ☐ Do you combine alliances, vendors and everyone else in the same database?
  - ☐ I recommend you have a SINGLE database and that every contact has a different type (VAR, SI, Alliance, Vendor, etc.). This way you can link leads to VARs, tie alliances to customers, etc.

2. Next, setup the fields within your CRM database
   - ☐ Contact Type: VAR, Alliance, Vendor, Consultant, SI, Other
   - ☐ Levels: Authorized, Gold, Platinum, NEW
   - ☐ Website E-mail Form (to put the link to their e-mail form)
   - ☐ Group: 1, 2, 3 (to identify which import group they are part of)
   - ☐ Status: New, email1, email2, email3, NI, Applied, Denied, Approved, Orientation, 1st Sale, Trained, Certified 1, Certified 2 (use your own certification level names if completed)

3. Create a test database
   - ☐ Create a small subset of your spreadsheet data (top 5 names with label)
   - ☐ Import the subset and map the fields to test if they import correctly. Re-test until it is clean.
   - ☐ IF it looks 100% clean, then erase the test and start the final import

4. Make sure all your live database info is clean and complete (using same info as step 2 above).
Backup your existing database. Now, import data into the live database.

3. Setup e-mail
   - ☐ Create the reseller recruiting template and test by sending it to yourself and about 3 internal contacts. Confirm it worked.
   - ☐ Create filters to pull up the group and run different campaigns

5. Campaign management
   - ☐ Learn how to do global changes to fields to change status
   - ☐ Set a filter for group one, e-mail1 and send out first batch of emails.
   - ☐ Change status to email2, then repeat
   - ☐ Remember to change the status to NI if the account opted out, or to Approved if they signed up, etc.

- ☐ Different CRMs handle campaign management differently, so some of these steps may need to be done differently.

You may get new reseller lists later from alliances, list brokers, or new web searches and will need to follow this process again. The primary difference is that you will usually have to export your database so you can de-dupe and combine in your spreadsheet first. Some CRMs have excellent de-duping and combining features, others do not, so you'll have to adjust accordingly.

How to Fix E-mail Formatting Errors (Example: Gmail to Outlook)

If you are sending an email campaign, you must test your emails to ensure they look correct on all receiving email systems—especially if sending from some web-based email systems.

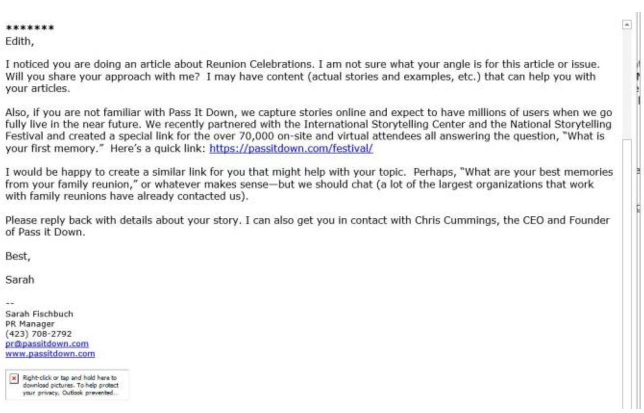
Formatting errors come from copying text from Microsoft Word into gmail and sending it). If you send a test email to yourself (if using gmail-->gmail) the formatting appears normal. The error most likely is occurring for users opening your emails with Outlook--which a lot of people are using. Other mass email systems often have the same problem.

How to fix bad formatting errors:

1. Copy content from Word to your email draft
2. Highlight all the content and click the button furthest to the right of the text bar located at the bottom of the email draft screen (looks like a Tx). This removes all formatting.
3. Delete extra spaces that usually come up, change font size—you usually want 14 pt because of the higher resolution monitors (or fix anything you deem as off)
4. Send the email. It will be received without formatting errors!

Example of spacing errors:

Sent



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Edith,

I noticed you are doing an article about Reunion Celebrations. I am not sure what your angle is for this article or issue. Will you share your approach with me? I may have content (actual stories and examples, etc.) that can help you with your articles.

Also, if you are not familiar with Pass It Down, we capture stories online and expect to have millions of users when we go fully live in the near future. We recently partnered with the International Storytelling Center and the National Storytelling Festival and created a special link for the over 70,000 on-site and virtual attendees all answering the question, "What is your first memory." Here's a quick link: https://passitdown.com/festival/

I would be happy to create a similar link for you that might help with your topic. Perhaps, "What are your best memories from your family reunion," or whatever makes sense—but we should chat (a lot of the largest organizations that work with family reunions have already contacted us).

Please reply back with details about your story. I can also get you in contact with Chris Cummings, the CEO and Founder of Pass it Down.

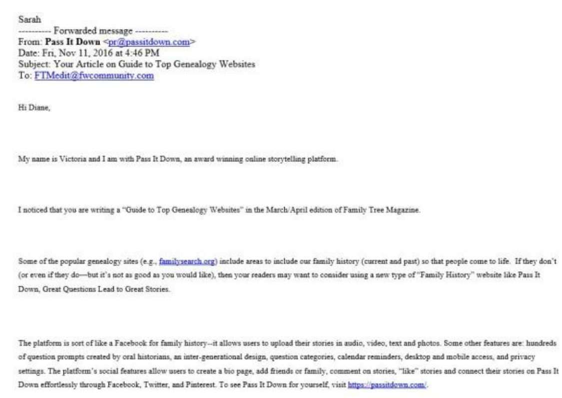
Best,

Sarah

--
Sarah Fischbuch
PR Manager
(423) 708-2792
pr@passitdown.com
www.passitdown.com

Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented...

Received



Sarah
---------- Forwarded message ----------
From: **Pass It Down** <pr@passitdown.com>
Date: Fri, Nov 11, 2016 at 4:46 PM
Subject: Your Article on Guide to Top Genealogy Websites
To: FTMedit@fwcommunity.com

Hi Diane,

My name is Victoria and I am with Pass It Down, an award winning online storytelling platform.

I noticed that you are writing a "Guide to Top Genealogy Websites" in the March/April edition of Family Tree Magazine.

Some of the popular genealogy sites (e.g., familysearch.org) include areas to include our family history (current and past) so that people come to life. If they don't (or even if they do—but it's not as good as you would like), then your readers may want to consider using a new type of "Family History" website like Pass It Down, Great Questions Lead to Great Stories.

The platform is sort of like a Facebook for family history--it allows users to upload their stories in audio, video, text and photos. Some other features are: hundreds of question prompts created by oral historians, an inter-generational design, question categories, calendar reminders, desktop and mobile access, and privacy settings. The platform's social features allow users to create a bio page, add friends or family, comment on stories, "like" stories and connect their stories on Pass It Down effortlessly through Facebook, Twitter, and Pinterest. To see Pass It Down for yourself, visit https://passitdown.com/.

Database Cleaning & List Management

Ok, now you've started sending the emails. The following will happen:

1. Some will bounce back if they are invalid (your system should tag these so they don't get more emails to a non-existing account)
2. Some recipients may click on UNSUBSCRIBE to be removed from your list (your system should stop sending them automatically)
3. Others won't click on the unsubscribe—instead they will reply to the email with REMOVE $#$%^#@@.
4. Others won't click anything, but they'll call you and say REMOVE $%@#^&#@@$ (yep, it happens).
5. Some reply by asking questions – you will want to respond
6. While some will just apply to your partner program – yeah!

With a three part email, the bounce backs and the auto unsubscribes won't get another email from your system (it will handle these automatically), but everyone else will get another email, unless you:

i) *Manually* remove everyone from items 3 – 6 above from your list.
ii) You will want to TAG (usually add a column and put an X or other symbol per type in your spreadsheet) them in your master database FIRST (so you have a record of it), but then
iii) Remove them from the ongoing list.
iv) Then… send out your next email in the batch.

This all occurs with your original list. To complicate things, you may later get a new list you scrapped from a competitor's reseller database. Or you get a list from an alliance partner, etc. The main thing—you MUST have a master list to compare and de-dupe these other lists against—or you could send another batch of emails from another lists to partners who have already said &^&^(*&(STOP! 😉

Sample of responses from a database – Below

				Remove				
First List		Dupes	Bounced	Auto	Direct		YES	
1							YES	
1								
1			bb			Y		
1				r		Y		
1							Y	
1					R	Y		
1								
1					R	Y		
1								
1			bb			Y		
2nd List								
2							Y	
2				r		Y		
2		d				Y		
2		d				Y		
2							Y	
2							Y	
2							Y	
2								
2		d				Y		
2								
Competitor List								
3								
3		d				Y		
3								
3			bb			Y		
3								
Alliance List								Reconcile this new list with existing lists
4								
4								
4								
4								
4								
4								
4								
4								

Steps to follow when you are ready to get started:

1. Confirm your email system is up and running (some systems take 24 hours before your special email URL is setup).
2. Load the FIRST email into their system. Follow the instructions of formatting an email on page 7.
3. Create a SMALL Test List (database) with just the internal team.
4. Proof the test emails when they come in. Make sure the name is using the name from your database (using the variables) and that the formatting and links are correct.
5. Take your CLEAN database and make a copy in the spreadsheet tab (if using the generic list). Then delete all columns but the name, company, phone, website and email (the critical identifying information). This way your email application won't freeze if it finds missing fields like previous levels, etc.—plus you won't need that information. Then import THIS list.
6. Then send your first of the three recruiting emails--preferably so they arrive during working hours.