The Infusionsoft® GUIDE TO SALES & MARKETING

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INTRODUCTION

Let's get one thing out of the way before we begin. You don't have to be an Infusionsoft customer to get a load of value from The **Infusionsoft Guide to Sales & Marketing**.

Within 60 minutes of sitting down and reading this, you are going to understand the ten most important core concepts of sales and marketing today. With that information, you'll be able to make informed decisions about what is probably the most important activity in your small business: how you will create and retain customers, and how you will obtain revenue.

Before we talk about how to sell and get you more customers, let's flip things around. Let's talk about the five stages prospective customers experience before they choose to actually become your customer. If we want to get inside your customers' heads, we have to think like a customer, right?

YOUR CUSTOMER'S BUYING CYCLE.

1. AWARENESS

This is when your prospective customer realizes that they need something, and that your company can fulfill that need.

2. CONSIDERATION

When a customer is trying to figure out whether you can meet their needs or not, they're in the consideration stage. They're also evaluating your competitors at this point.

3. PREFERENCE & INTENT

This is when the customer finalizes their purchasing decision, comparing your company against other potential options, including doing absolutely nothing about their problem. Generally speaking, emotion outweighs logic here, and the customer is looking for a rational reason to justify an emotional purchasing decision[1].

4. PURCHASE

This is when the customer (now a sales-qualified lead) actually buys something from you for the first time.

5. RE-PURCHASE

This is when a customer becomes a repeat customer, with their second purchase.

[1] **Heath,Chip & Dan. Switch: How To Change Things When Change Is Hard, 2010, Crown.**

In this e-book, we'll refer back to these five ***Customer Buying Cycle*** *stages often just to make sure you're clear on exactly what your customer is thinking at each point throughout the sales and marketing process. As you can probably guess, we're going to figure out how to develop different types of content for each of these stages so you're meeting each of your customers' needs in each stage.*

LEAD ACQUISITION & LEAD NURTURING

What is a lead? There's a reason that this is the very first topic in this e-book. If you don't know what a **lead** is, or what to do with a lead, then you won't be able to get any customers, much less keep any customers. Before a person can become a lead for your business, they need to engage with you in some way. When we say "engage," we mean that they're giving you their contact information, in exchange for some valuable information that you're giving them.

Now, let's not think too narrowly about way a customer can engage with your company for the first time. Before you can even get a lead, you have to have multiple paths to engagement. We've broken them down by time period, to keep it simple. First we've outlined the pre-1995 ways of getting leads, then the Digital Marketing methods, from the recent past. Last, we're looking at the ways companies have begun to obtain **leads**, just in the last few years.

TRADITIONAL MARKETING

(Pre 1995)

- Your Retail Location
- Outdoor Billboard
- A Speech That Someone From Your Company Gave
- TV Ad
- Trade Show Booth
- Radio Ad
- A Paper Flyer
- Contests

DIGITAL MARKETING

(1995-2005)

- Organic Search Engine Optimization
- Online Squeeze Page
- Search Engine Marketing
- Online Forums
- Online Banner Ad
- Online Contests

SOCIAL MEDIA

(2005-Today)

- Facebook
- Twitter
- LinkedIn
- Your Blog
- Your Guest Post On Another Company's Blog
- Podcast
- Social Network Ad
- RSS Feed Advertisement
- Mobile App (i.e. Your company's app)
- Mobile Ad

Usually, the way to get a lead is to offer something incredibly valuable to them. Some people call that a "magnet." This offer to the lead has to be good enough to take them from the ***Awareness*** *stage to the* ***Consideration*** *stage. Whenever you're developing a magnet, you have to ask yourself, "Is this offer really good enough for me to give someone my name, email, and maybe even my phone number?"*

WHAT IS LEAD NURTURING?

Lead Nurturing is the systematic and repeated process of helping your prospective customers get from the **Awareness** stage to the **Purchase** stage as quickly as possible. Also, it's a process that helps them decide that they *absolutely, positively don't want to do business with you* because they have no need.

Yes, you read that correctly. Far too often, small businesses think that their marketing and lead nurturing is supposed to make a prospective customer an actual customer at all costs. That's an over-simplification and completely, dead wrong.

In lead nurturing, all you're trying to do is get the prospective customer to say "YES" or "NO," and to get them to stop saying "NOT NOW, I'M NOT SURE." By sending that customer fantastic content that talks about how your company can satisfy their urgent needs, you will get them to say, "YES."
If the prospective customer does not have a genuine need to work with you, what's the point of wasting your marketing monies and selling costs? Wouldn't you want to avoid throwing away anywhere from £1 to £3000 per customer? You should, because that's what you're probably spending on trying to secure customers right now, depending on the cost of what you're selling.

WHY IT'S POINTLESS TO DRIVE TRAFFIC TO YOUR WEBSITE IF YOU DON'T DO LEAD NURTURING

"Your web traffic is pointless." This is a pretty hard thing for any business owner to hear, especially if you have 5,000 to 10,000 people coming to your website every month. Nonetheless, it's the sad truth *if* you're not following a specific set of repeatable, automated processes to turn every single website visitor into a customer. Sure, an established business like Amazon.com, can simply count on customers who know them from their 18-year history, to come and repeatedly purchase, however, your small business lacks the traffic, history and size to make such an assumption.
So, by using some form of a "magnet" and lead nurturing on your company's website, you have the opportunity to turn a situation where someone who is not yet a lead and is "just looking," into a situation where you've acquired a lead, and they're one step closer to making their first purchase.

HOW DOES LEAD NURTURING SAVE YOUR BUSINESS TIME?

How long does it take to personally write 8 to 10 emails to a customer? Assuming that a really polished marketing email takes 30 minutes to write, it takes about four and a half hours. Does your business really have *four and a half hours* to spend every time a customer is interested in your goods and services? Didn't think so.
On average, every time you use marketing automation to engage with a customer, you're saving your business 4.5 hours of manual labour. Assuming you have a few thousand customers clicking on something on your website (or other marketing materials) every month, you're talking about a time savings of 9,000 hours. That's more than four years' worth of manual tasks, automated.

WHAT IS "QUALIFIED TRAFFIC"?

You know what the most frustrating feeling in selling is? Going through your entire sales process with a lead, only to discover that they're not the person in charge of the buying decisions in their home or business. You know how to get around that problem? Only allow **Qualified Traffic**.

There's no point in having leads, if they're not qualified leads, right? So, let's go over the steps to getting ONLY qualified traffic. There's no "trick," per se, but you need to make sure that the questions in your marketing materials simultaneously give the customer the information they seek, while also profiling your leads for a very important type of criteria: ***budget, authority, need*** and ***timeline***. Some smart guys at IBM in the 1960s came up with an acronym for this. Since IBM did about £106 billion in sales last year, we can feel pretty confident in using their sales criteria.

They call it **BANT**. In the sales and marketing process, if you can't prove that a lead has BANT, then you're not going to get a sale. Let's break down each one, and the types of questions to ask to help figure out if you're getting qualified traffic. This may sound a little strange, but we're actually going to approach them out of order, because some are more important than others. These are the kinds of questions you can only ask when a customer's in the **Consideration** and **Preference** & **Intent** phases. If you ask too early, leads will think that you're too pushy.

1. NEED

It's kind of funny that this one is third in the acronym because it's absolutely the ***most*** important. If a lead does not have a basic need for your product, then you will never, ever make that first sale. Here are a series of questions you can ask in your marketing-- perhaps as survey questions-- to assess whether a customer actually has need. Give the customer multiple choice answers to figure out
where their head is at, definitely allow them to say, "I don't really need this right now," and let them explain why. When you run across one of those, you can always either "snooze" your marketing to that lead for 60 or 90 days, or, market a different product to that lead altogether.

"If you don't buy our product in the next couple of weeks, what will you do to solve your XYZ problem?"

- In this case, XYZ is whatever problem your company solves. For example, a car dealer would say, "If you didn't buy a Mazda in the next couple of weeks, what will you do to solve your transportation problem?" Multiple-choice answers would include "Borrow a car", "Rent a car," "Take the bus," or "I don't really need a car right now."

"Why do you need our product right now?"

- Some multiple choice answers could include "My old one no longer works," "My old product is too slow", and, of course, "I don't need the product at this time."

2. AUTHORITY

Authority is a ***much*** bigger challenge for companies that sell business-to-business than companies that sell business-to-consumer. If you're selling directly to consumers, the biggest "authority" challenge you may run into is if your marketing doesn't speak to women in a big way. Numerous studies have shown that over the next 25 years, women will control 66% of all consumer wealth in the United States[2]. So, if your consumer-targeted marketing ignores the fact that a woman is likely to be the economic decision-maker on the purchase, you may run into problems.

If you're marketing business-to-business, asking your leads questions about authority is not only easy to do, but it's expected. Here are the types of questions to ask, and be sure to allow for multiple-choice answers:

- **The "How" Question:** "***How does your company make buying decisions for XYZ?***"

  Some options here could include, "We make them as a team," "I decide, and then get approval from my boss," or "We usually have a series of in-person meetings with vendors."

- **The Economic Decision-Maker Question:** "***Do you make the financial decisions for XYZ by yourself, or is it another person?***"

  This one's pretty self-explanatory, and you'd be surprised how many leads will answer it honestly.

2 Claire Behar, Senior Partner and Director, New Business Development, Fleishman-Hillard New York, http://www.she-conomy.com/facts-on-women

3. TIMELINE

Timeline questions are pretty nice because your leads find them rather innocuous, but they can actually give your business great data to use on your marketing campaigns; they give you a sense for how urgent the lead's need really is. Sample timeline questions include:

- **"Would it be possible for you to delay this purchase by 90 days, or would that cause a big headache?"**
- **"Would it cost you (or your company) money to delay this purchase for 90 days?"**

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4. BUDGET

This is a tricky one. Often when a lead actually lacks need, or doesn't have independent control over the budget (***authority***), then they will say that they have no budget, even if that statement is not true. So, instead of asking whether the customer has it in the budget, ask about how the budget is created. And remember, budget is only something that you'll normally deal with in B2B marketing campaigns, typically only for larger-sized purchases. Your best question might be:

- **"How does your company determine budget for XYZ?"**

Answers would include, "We base it off of last year's budget," "We have a meeting to decide," and "We base budget for solving XYZ problem off of the financial cost of the problem." If your sales team is armed with this data, it will make it much easier to get aligned with the customer in the final stages of the sales process.

If you're wondering where exactly these questions will go in your marketing campaigns, they will be on your landing pages, which we'll go over in a just a moment.

LEAD & CUSTOMER SEGMENTATION

WHAT IS IT?

If you're not segmenting your leads and customers, then you're treating very different groups of people the same way. That is a really bad idea because it causes customers to think, "*This company doesn't understand me or my needs*." Customers do not buy things from companies that don't understand them. So, to prevent this from happening, you need to divide up your customers and leads.

WHY DOES IT HELP SMALL BUSINESSES?

Segmentation is so valuable for small businesses because it makes sure that you never, ever waste a dime of sales and marketing money on customers with zero buying potential. Also, it's the most courteous thing you can do for your leads, as you're showing them that their time is valuable.

MAKING SOMEONE NON-MARKETABLE: HOW DO YOU DO IT?

Most sales and marketing systems allow you to simply place a tag, or a label, on a lead that says "non-marketable." The system then removes the lead from your marketing campaigns either for a certain period of time, or permanently.

WHO *DON'T* YOU WANT?

It sounds kind of strange, but there are five types of customers that you don't want- ever- and it's your job to actively throw these customers OUT of your marketing to avoid wasting money on them. The BANT questions we just went over will help with that because when these leads give the wrong answers, you can mark them as "non-marketable" in your sales and marketing system.

ASSESS YOURLEADS

1. **Complexity of Need or No Need:** If the customers' needs are too complex for the solution you provide, you don't want them. Also, if the customer repeatedly tells you that they have no need, they might just be non-marketable.

2. **Budget:** If the lead simply does not have the budget, and has no way to obtain the budget - perhaps you're selling £350,000 homes, and the lead only has an income of £35,000 - then you want to make this lead non-marketable.

3. **Age:** If you're selling business-to-consumer, age can be a really important way to tell if a customer is non-marketable. For example, if you're selling housing for senior citizens, and a lead is 20 years old, the odds are that their "ageing parent" is probably around 45, and not 65 or 75, so that lead is non-marketable.

4. **Authority:** This is a tricky one, because leads that lack authority should not be set to nonmarketable. These leads should be routed to your sales team, or sales development team, so that you can call them to find out who else on their team may have buying authority.

HOW DO I GET STARTED DOING IT?

This part is surprisingly easy. All you need to do is ask the BANT questions at various stages in your marketing campaigns, then make sure that your company's automated marketing decisions are determined by the answers to those questions. These BANT questions are the most important questions you can ask your leads.

LANDING PAGES, WEB FORMS & CALLS-TO-ACTION

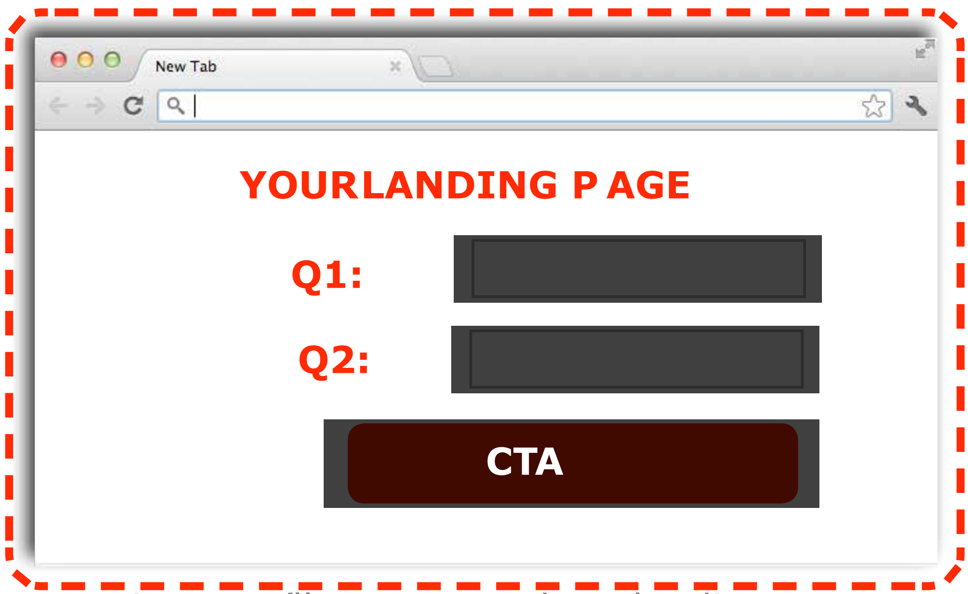
WHY IN THE HECK WOULD YOU NEED THIS?

This next part might be a little hard to hear, especially if you run a business that does very high-quality work, but customers don't want to talk to you. At all. Things have changed pretty dramatically since the 1970s and 1980s, when customers absolutely had no choice but to talk to a salesperson. Today, with the mobile internet, all a customer needs to do to learn more about your company is pull their phone out of their purse or pocket.

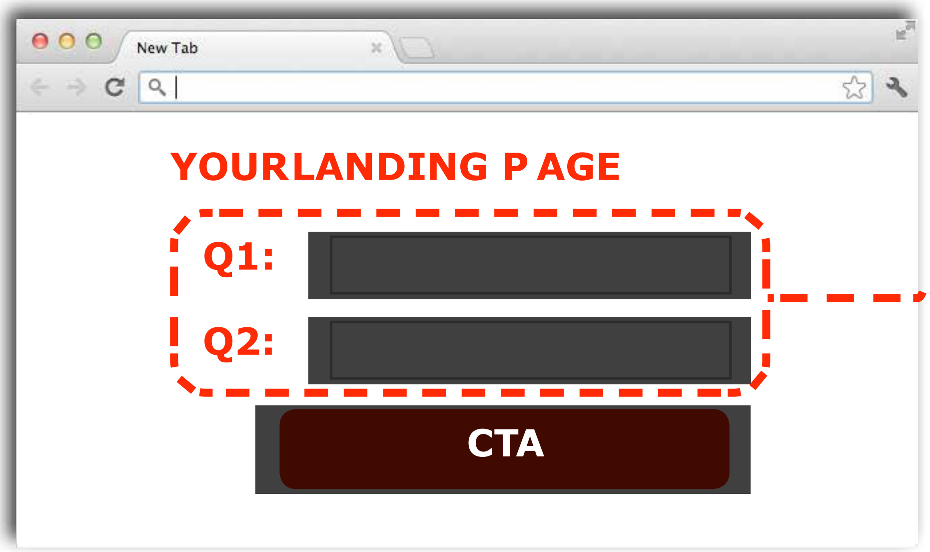
However, small businesses actually have a new advantage. Before you show your leads the content they want to see, you're allowed to ask them questions to get more information from them. The way that most smart small businesses do it today is by using *landing pages*, *web forms* and *calls to action*.

WHAT ARE THEY?

Landing Pages

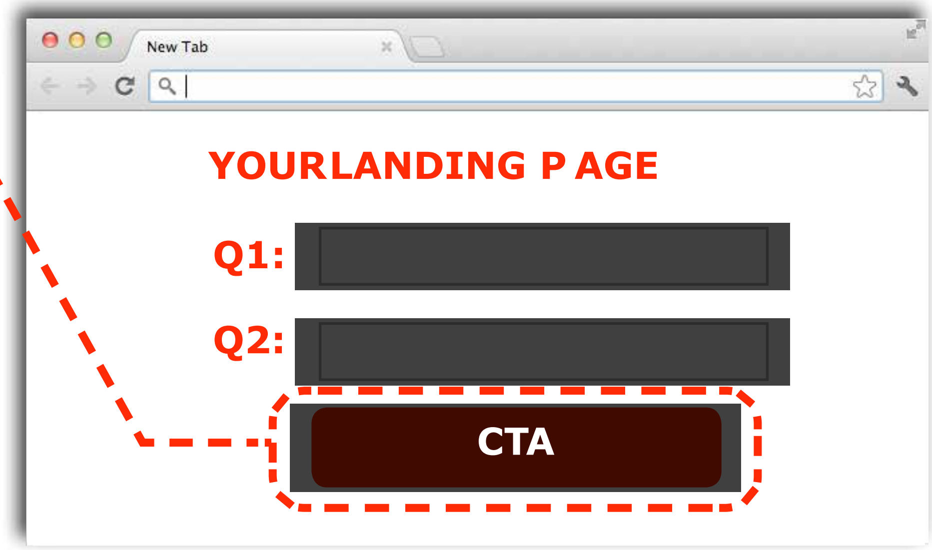


are web pages that you make for specific marketing campaigns but are not generally a part of your regular website. For example, if you have a holiday promotion, and you send an email out to 2,000 leads in order to let them know about the promotion, you'll want to make a landing page for that promotion so that those leads can take the next step to become your customers. Typically, when a lead gets to a landing page of yours, you only want the lead on your landing page for 30 to 60 seconds. The only purpose of a landing page is to take your customer from one part of their buying cycle to the next part. When they reach your landing page, you're hoping that they fill out a web form, which allows them to give you more information about how you can help them, and helps them answer your BANT questions. The best landing pages typically contain only a small amount of sales copy, typically written in the second person (using words like "you" and "your").



Web Forms are pretty simple, really. They're just little groups of questions, usually four or five at a time, and they live on your landing pages. Try to ask as few questions as possible on your web form, in order to get the information you need from customers. For example, instead of asking a customer for their post code, city and county, only ask for their post code.

If you're looking for a secret weapon, you've found it in the **Call-to-Action** It's funny that it means so much, because it's just a tiny little button that sits on your landing page, usually at the very bottom of your web form. However, if the customer doesn't click on it, it means that they're generally not going to the next stage in the buying process with you. A call-to-action is a big "yes" from your lead, and when they don't click it, they're telling you, "No thanks. Something about this offer does not work for me."



WHY THEY ARE NOT OPTIONAL.

Landing pages, web forms and calls to action are a requirement if you're going to automate your sales and marketing. If you're not doing these things, you'll notice that while your competitors are using today's marketing and sales technologies, you won't be able to reach as many customers from the same marketing and sales budget. What that means is that your company would acquire fewer customers and eventually lose market share. Why not make less work for yourself and get more customers at the same time?

HOW DO YOU BUILD A LANDING PAGE, WEB FORM, OR A CALL-TO-ACTION?

In the past, landing pages and web forms were really complicated to build. You used to have to know HTML (the coding language of the web) to do this. These days, it's just drag-and-drop, and using your sales and marketing software, building a landing page, including web forms, only takes 10 to 30 minutes. Building a call-to-action only takes a minute or two, and you can build them while you're building your landing pages. Most sales and marketing software companies like Infusionsoft have training videos that can teach you how to build these in under an hour [3].

3 http://help.infusionsoft.com/training/webinars/ mastermindcalls/archive/mastering-landing-pages

EMAIL FOLLOW-UP SEQUENCES & MARKETING AUTOMATION

WHAT ARE THEY?

Email follow-up sequences are groups of emails - usually three to six emails - that are sent to a lead or customer in succession a few days or weeks apart. All email sequences have two things in common, and they're quite important:

1. **A trigger event:** Something always starts an email follow-up sequence. That trigger event could be a lead filling out one of your web forms, a lead filling out a form on your Facebook page, or even a customer purchasing a given item.
2. **A Goal:** Every email sequence has a goal, and that goal is nearly always a customer-driven outcome. A goal of a sequence could include filling out a webform, attending an event, or purchasing a product.

*When you put a series of email follow-up sequences together and link them to one another, what you have is called a **Campaign**. We'll explain how to use campaigns in just a few moments because they are far more powerful than a single email follow-up sequence.*

***Marketing automation** is what allows leads and customers to be in charge of the marketing that they'll receive from you, and that makes customers happy. When you set up marketing automation, customers and leads can choose which marketing they want to see, and they'll never feel like you're "spamming" them. When you set up your marketing automation correctly, you'll get higher opt-in from leads, higher click-thru to purchase rates, and, most importantly, the reputation of being an ethical and confident marketer.*

WHY IS MARKETINGAUTOMATION BETTER THAN “BATCH & BLAST”?

There are plenty of regular email marketing companies out there; some have been

around for over a decade, and some are pretty good at basic “batch and blast” email. Around 1999, when marketing automation came out, many bigger companies realized that using nonautomated email marketing put them at a competitive disadvantage. That’s why thousands of companies have adopted marketing automation technology since the late 1990s. There are three key disadvantages to using “batch and blast” email:

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1. It doesn’t allow your customers to self-select the marketing that they want to see.
2. It doesn’t allow your customers to opt-out of a given campaign easily, usually causing them to opt out of your entire marketing funnel by accident.
3. It lacks any e-commerce integration or any reasonably good CRM integration, causing your team to have to duplicate a lot of work.

WHY DON'T YOURCOMPETITORS USE MARKETINGAUTOMATION?

Right about now, you're probably saying, "Gee, if marketing automation is so brilliant and powerful, then why aren't all of my competitors using it?" There are probably two reasons why they're really having trouble wrapping their heads around it.

1. *They can't envision the path from "Current State" to "Future State"*

One huge problem that a lot of small businesses face around sales and marketing is that they're unable to visualize what it takes to get from where they currently are, "the current state" with zero marketing automation, to a "future state," where they have marketing automation. They don't even know what the steps look like, and they just assume it's going to be too complicated.

2. *Fear of commitment and a lack of resources*

They probably heard somewhere that marketing automation costs £100,000 per year.
It did - in 1999! These days, you can actually automate your sales and marketing for a few hundred pounds per month. These competitors of yours are also probably thinking, "We'll need a dedicated employee to run our sales and marketing system!" The truth
is that it can actually be run with all of the basic features in about an hour a day.

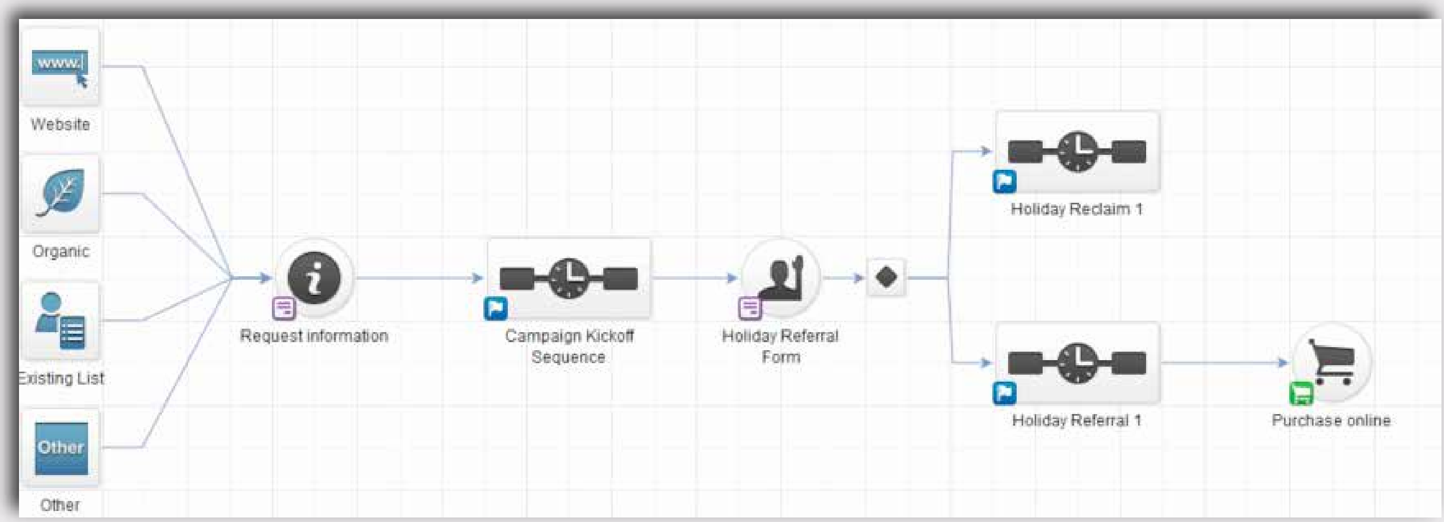
Marketing automation is a technology that you really don't want your competitors using because your own company benefits from their sales and marketing teams' wasted time and efforts. You'll be automating tasks that your competitors will be doing manually, so when you show up at an industry conference, don't feel compelled to rub your automated sales and marketing in their faces.

CAMPAIGNS

We talked briefly about campaigns a few pages back, but they deserve a thorough explanation. **Campaigns are so much more powerful than follow-up sequences** because they allow you to use an optimal combination of follow-up sequences to drive leads and customers to a desired outcome, usually over a period of time (a few days, or even weeks). The best campaigns usually have a variety of triggers, and usually make an impression on your clients from a variety of different mediums. We call this the "new movie" effect.

When a new movie comes out, you see advertisements for it just about everywhere: Facebook ads, billboards when you drive down the highway, and ads for the movie on the radio. The best campaigns have a similar effect on your customers. Frequently, a customer may ignore the campaign the first couple of times they hear about it, but often, on the third or the fourth exposure, they'll opt-in and proceed to the next step in your campaign. Turns out those Hollywood movie folks know a thing or two about marketing!

WHY IS THE VISUAL APPROACH TO CAMPAIGN BUILDING THE EASIEST WAYTO DO IT?



Let's face it: if you're reading this, you're probably not an expert computer programmer. Even if you are, do you really trust yourself to work on something that's really a visual "art" - your marketing - using lines of HTML code? Using a visual campaign builder is the easiest possible way to automate your marketing. Here's why:

1. To the human brain, campaigns make a lot more sense when there is a visual
2. It's much easier to catch errors using a visual campaign builder
3. If someone on your team wants to make or suggest a change, they can simply drag-and-drop
4. You can copy or clone visual campaigns, which can save you dozens of hours each time you create a marketing campaign

HOW LONGDOESIT T AKE TO BUILD A CAMPAIGN?

Typically, it takes about 30 to 45 minutes to actually lay out all of the icons in your campaign using the campaign builder. From there, it takes about 4 to 8 hours to actually write all of the email and marketing copy for your campaign. All told, the average campaign takes about **6.5 hours**. Over the last few years, I've found that the best way to do it is to assemble a campaign in five or six sessions of about one hour each, rather than doing it in one marathon session.

There is one other rule you should know about campaigns. We call it "four sets of eyes." It's best to run every piece of your marketing by four different people (you, plus three others) before ever showing it to a customer. Here's what you're trying to catch when you run these pieces of marketing content by the rest of your team, friends or family (if you don't have a team):

1. Spelling errors
2. Grammatical errors Jokes that might fall flat
3. on your intended audience
4. Language that may simply be too difficult for your audience *(aim for an 8th12th grade level*[4]*)*
5. Errors in the "flow" of your campaign, such as introducing an offer that is either expired or invalid for a certain set of your customers

4 **You can actually check the grade level of your marketing online, using what's called a Flesch Kincaid Calculator.**

CHECKING YOUR LEAD SOURCES & MARKETING RETURN-ON-INVESTMENT (ROI)

I have a Facebook page for my business, and I typically spend £5 or £6 every day to get a few more Facebook fans. So far it's worked out well for me, but I always want to make sure that if I'm spending money on any paid source (social network ads, newspaper advertisements, search engine marketing) to get traffic back to my company's web site, that I'm getting new customers from it. So, on the last day of every month, I check how much I spent to acquire customers, and then I enter it into my "lead sources" screen in my sales and marketing automation software.

The reason I do this is because I want to make sure that I get £5 to £20 back for every pound I invest. For example, I invested £136 in Facebook ads last month. Over the next year, I want to make sure that I receive £680 to £2720 worth of business for that investment, otherwise I'd be throwing away money!

HOW DO YOU AVOID WASTING MARKETING MONIES?

This part is so simple that it will blow your mind; you don't need to be a marketing genius to understand marketing ROI.

All you need to do is put an event on your calendar for 15 minutes at the end of every month called "Marketing ROI meeting". Then, simply take all of your marketing receipts for the month and enter them into the Lead Sources part of your sales and marketing system. Next, you need to run your Marketing ROI report for this year to date. If you have any marketing lead sources that are not earning you over 500%, it's probably time to move those monies elsewhere.

SALES & OPPORTUNITIES

WHAT'S THE POINT OFUSING CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TRACK OPPORTUNITIES?

Maybe you ran into a competitor at a recent industry event and they could not stop talking about their awesome customer relationship manager (CRM) system. Or maybe *nobody* in your industry uses CRM. CRM has actually been around since 1987, and today it's more popular and cheaper than ever before for small businesses. There are three big reasons why small businesses like CRM:

1. *It allows them to see all of their customers in one place*
2. *It allows marketing, sales and customer service to get on the same page about everything that's going on with any given customer*
3. *It makes sure that none of your customers' information ever gets lost*

HOW DO YOU GET STARTED IF YOU'VE NEVER DONE IT BEFORE?

Some sales and marketing systems come with some kind of CRM and some don't. Infusionsoft is one that does. If you've never used CRM, you can usually learn to use the basic features in about 15 minutes. There are really only three main parts of every CRM: **contacts, companies and opportunities**. Contacts are the leads and customers you do business with, companies are those that your contacts work for, and opportunities are possible business deals that you have with those contacts. Nearly every CRM company allows you to take their product for a quick trial just to see how you like using it. Importing your customer data into a CRM is also easy; it only takes about 30 to 60 minutes.

WHAT ARE THE POSSIBLE OUTCOMES ON AN OPPORTUNITY?

YES, NO AND MAYBE

Whenever you have an opportunity with one of your contacts (a lead), there are three things that can happen: the lead can say, "yes," "no" or "maybe." Getting a "yes," is pretty awesome - it means you just sold something. Getting a "no" is not so great, but it's a clear answer, and we'll explain what to do with the answer, "no" in just a moment. The "maybes" are the worst; that's probably what small business sales professionals hate to hear more than anything.

There are two solutions to the "maybe" problem. The first is to completely accept the fact that most small business sales are actually made on the 7th, 8th or 9th contact with the customer. Most small business sales professionals typically give up on the 2nd, 3rd or 4th sales call, and that's when you're simply going to have to be more persistent. Your leads do not expect you to stay on top of them in a "politely persistent" way until that 7th, 8th or 9th contact, but that is when the sales happen and you need to design your marketing around that.

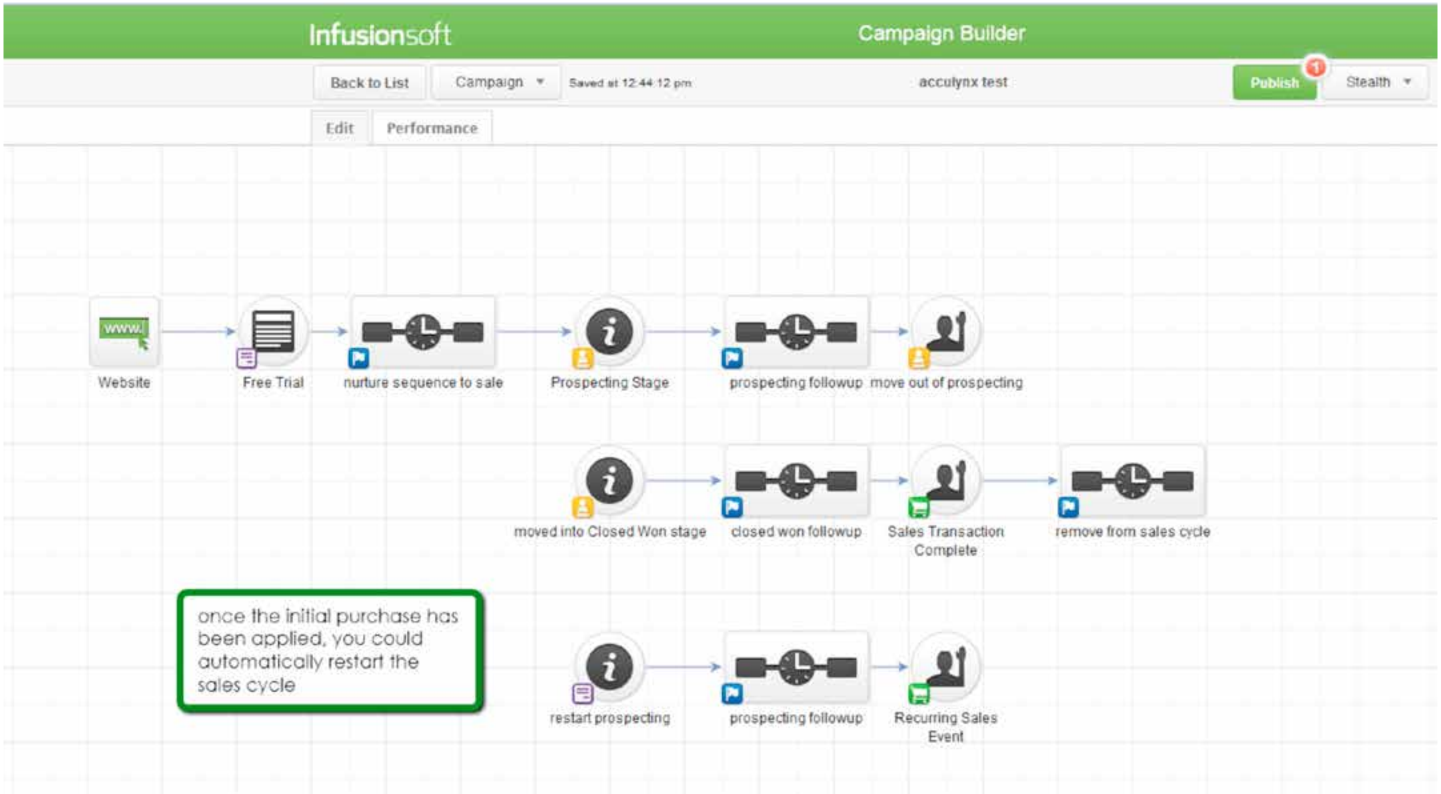
HOW TO CLOSE AN OPPORTUNITY: GET THEM OUT OF MAYBE

If you are a small business sales professional and you're unsure how to train yourself or your sales team on this, we've got a great book recommendation for you. It's the best sales book I've read in the last five years, and it's written by Skip Miller, who is actually a friend of Infusionsoft's. The book is called *Proactive Selling*, and you can find it for about £10[5].

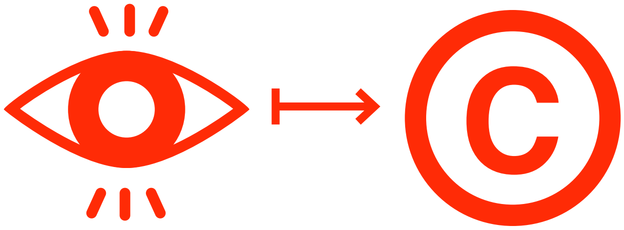
One of the things that Skip Miller covers in a number of ways in *Proactive Selling* is that the best sales professionals are not necessarily fast-talkers, smooth, good looking, young or attractive. They're just good at one thing: politely asking the right questions that get your leads out of maybe, and to the point of a firm "yes" or a firm "no." You may find this method completely different from the style of selling that you originally learned, but it's much more effective and it's much more respectful to the customer.

5 http://www.amazon.com/ProActive-Selling-Control-ProcessSale/dp/0814407641/ref=sr_1_1?ie=UTF8&qid=1347665704&sr=8-1&keywords=proactive+selling

WHAT DO YOU DO WHEN THEY SAY MAYBE OR NO? RECYCLE OR NON-MARKETABLE



*Now you have a plan for when a lead says "maybe" or "no" - this is one of the best features of having a sales and marketing automation system. If you are certain that a lead will absolutely, positively never become a customer, that's okay! Have your sales and marketing system label that person as "non-marketable." Then, if you come across leads that are simply not sales-ready at this time, you can put them in special marketing campaigns called **recycles**. The idea of this type of campaign is to slowly and gently prepare the lead to become more sales-ready over a longer period of time, like 6 or 9 months. You will contact the lead less frequently, perhaps twice a month, rather than once or twice a week, as you would in regular lead nurturing sequences.*



WHAT DOES IT TAKE TO GET BRAND AWARENESS?

One of the absolute most difficult things to do these days is to maintain brand awareness. Advertisers and brands have been studying what is called "information overload" since the early 1970s, and a popular 2009 New York Times article[6] stated that the average American takes in 100,000 words of content per day. For a little perspective, the book *War and Peace* is about 460,000 words long. That awesome marketing email that you just sent is going to be less than one half of a percent of all of the information that a given consumer sees every day.

Back in the 1970s, advertising professors used to say that you needed six impressions on a customer. This meant that customers had to see your brand name six times - just so they would remember who your company was and with a little assistance, as in, "Hey, have you heard of Infusionsoft? Yes, I have." Advertising professors call that aided recall. But what you're really going for when you're trying to make customers aware of who you are is unaided recall. And that's tough!

6 **http://bits.blogs.nytimes.com/2009/12/09/the-american-diet-34-gigabytes-a-day/**

THERE ARE FOUR BIG WAYS TO MAINTAIN BRAND AWARENESS THESE DAYS. HERE THEY ARE:

1. **Link-Building:** Use your sales and marketing automation software to make sure that your company's website is linking to real and relevant websites every month. If this isn't happening, perhaps enroll in a brief online course on (legitimate) link-building.

2. **Modest ad spend:** You can create a significant amount of brand awareness advertising very effectively if you target a very narrow audience (e.g. women, age 35-40, North Dakota, college graduates) with a high amount of ad impressions using Google AdWords or Facebook. Even a small investment of a few hundred pounds can really build awareness, if your target is narrow enough.

3. **Content-Aware Ads:** Be sure that if you do advertise online, that your ads are only being shown in content-relevant areas. For example, if you're selling car-care products, make sure that your ads are only appearing in car-care forums and auto websites, rather than in sites that target other audiences.

4. **Strategic Referral Partnerships:** Be sure to have numerous co-marketing partnerships (i.e. 10-20) with companies whose offerings compliment yours. For example, if you're a running costume store, it might make a lot of sense to have a partnership with a party-supply store. If you run a large corporate accounting firm, you may want to form a strategic referral partnership with a payroll firm. These types of partnerships not only build brand awareness quickly, but build trust faster, which leads to quicker sales.

TOTAL AWARENESS: HOW TO STAY TOP-OF-THE-MIND BETWEEN PURCHASES

There's a little-known feature in marketing automation and it's the best way to stay on your customers' radars in between purchases. Whenever a customer buys something from you, you simply add three small "tags" to that customer's record in your sales and marketing system. These tags signify whether a customer has bought something in the last 90 days. Make each tag explicit: call each tag "30p," "60p and "90p." Following tagging, set up your system to remove each tag after a certain number of days if a purchase has not recurred. You can then set various brand awareness campaigns to run if a customer does not have the 30p, 60p or 90p tag attached to their contact record. It's a great way to maintain awareness with folks who haven't purchased from you in quite a while.

WHAT PERCENTAGE OF YOUR CUSTOMERS ARE ON SOCIAL MEDIA?

These days only 8 to 28% of your customers are NOT using social media in their buying process[7]. That means that a startling majority of them are using social media, every day – a great opportunity for your company.

HOW OFTEN DO YOU WANT TO TOUCH YOUR CUSTOMER?

This is a really tricky one, and it's largely dictated by your customers' buy cycle. The best answer here is, as little as possible, but as often as possible, as to maintain your customers' buy cycle at the rate that you see fit. For example, if your customers typically buy once a year and you've noticed that a given customer is beginning to buy less often, I'd increase the frequency of contact. BUT - and this is a big but - if you notice that customer opting out of one or more campaigns, I'd recommend slowing down the frequency of contact. When customers opt-out of campaigns or don't respond to them, that's their way of saying, "You're beginning to annoy me. You're not annoying me to the point where I refuse to be your customer, but I need you to back off a little bit."

Do what your customer tells you, and you'll both be better off in the long run.

[7] This range of figures comes from a variety of studies over the last three years including Forrester, Pew Internet and American Life and Gartner.

HOW?

Typically, these days, the mix of "customer touches" goes across a variety of mediums. Here's an easy way to remember it: "4 screens"

TELEVISION
(if it is in your budget)

INTERNET
(including social media)

MOBILE PHONE

TABLET
(i.e. iPAD)

Then, if you can afford it, perhaps even other mediums, like radio, but print can fit into the mix, too. Remember, your sales and marketing system can track the return-on-investment of all of your paid and unpaid media that you use to touch your customers, so be sure to track it so that you'll know what's working, and what you might want to get rid of!

WEB ANALYTICS: WHY SMALL BUSINESSES USE IT

WHY ARE WEB ANALYTICS IMPORTANT? Until about ten years ago, most small businesses didn't even bother to use web analytics. They simply had no way to gain insights into what their leads and customers were doing on their website, or what was working and what wasn't.

Then something really cool happened in 2005. Google bought a company called Urchin, and another company called Measure Map. Suddenly, small businesses had access to really good web analytics software. The problem is that as Google's analytics solution has grown: it has become too difficult for most small businesses to use. That's a big reason why Infusionsoft added web analytics to their product in 2012 [8]. Now small businesses can easily create a customized experience for leads and customers.

HOW DO SMALL BUSINESSES USE WEB ANALYTICS TO GET CUSTOMERS?

It's pretty simple. Your web analytics report shows the number of page views, visitors, contacts, customers and average time spent on a page. Here's what your web analytics will tell you:

- Which web pages are just not working for your customers.
- Which pages are actually causing leads to say "I don't want to give you my information."
- Which pages are actually causing leads to say "I am leaving your website now."

Web analytics is so powerful because no lead or customer would actually ever tell you any of this information, and even if they did, it might be personally biased. By using web analytics, you harness the experiences of all of your customers, to make smart marketing decisions that will have an immediate impact on your sales.

DO YOU STILL NEED GOOGLE ANALYTICS?

Once you begin using an integrated marketing and sales system like Infusionsoft, you can use Google Analytics, but you'll notice that the information you're getting from the web analytics on your marketing and sales system may actually be more useful, and a little easier to read.

8 http://www.infusionblog.com/infusionsoft-products/4-new-lead-generation-features/

SHOPPING CARTS, E-COMMERCE & UPSELLS

WHAT'S THE POINT OF USING E-COMMERCE?

If you make things convenient for customers, they will do business with you. If you allow your customers to purchase from you when they're ready and in the manner that they choose - especially if your competitors are not - it's likely that they will do more business with you. Using e-commerce is one of those ways that you can stand out from the competition, especially during the **Preference and Intent** phase. At this point, the customer knows that they need to purchase something, and they're trying to decide from whom it will be easiest to purchase. leads and customers.

WILLE-COMMERCE SAVE US MONEY?

The cost savings of e-commerce are very clear. On a per-transaction basis, it saves your company about £10-20 in labor.

DO SMALL BUSINESSES REALLY USE E-COMMERCE?

This is a valid question; if you're not seeing your competitors using e-commerce, you're probably wondering if you really need to use it. Here are compelling reasons you might want to begin using it.

1. Each time your company uses e-commerce to process a transaction, you save about £10 in administrative costs. That's £10 more profit for your bottom line.
2. It allows for systematic personalization of your customer's **Purchase** stage (which customers love) and simultaneously lowers your sales training costs.
3. It ensures uniform processes across all of your sales transactions and allows you to test to find the most effective check-out process.
4. The less time that your team spends processing orders, the more time they can spend selling or solving customer service issues.
5. Any time you automate something that your competitors don't, it gives you a competitive advantage.
6. Believe it or not, your customers prefer online checkout because it's generally faster for them and more convenient.

WHAT IS AN UPSELL?

You know the feeling - you're about to purchase a new car, and sales rep reapproaches you, and asks you if you'd like to move up to the next model for only £4,200 more - you know the one with the 10% better gas mileage, a slightly snazzier stereo, and a moon roof? When you take out your calculator and do the math, you realize that if you spent £4,200 today, you will make back most of it in gas costs over the life of the car, and you'd be driving a car that's nicer and more environmentally friendly.

That's a *tough* decision. And that, my friends, is an upsell.

It's a situation when a customer, right as they're about to make what they think is a great choice, is presented with another choice that potentially offers them even better benefits, and really causes them to stop and think, "Wait a second, this new choice might actually be a really good idea."

At this point, the customer is searching for rational justification for a decision that they have – emotionally - already made.

When you create upsells for your customers, what you're doing is taking customers who are already in the **Purchase** stage and helping them articulate the needs that they perhaps didn't even know they had. Upsells are great because you're potentially delivering a tremendous benefit to a customer and helping your customers discover their own latent needs *("Gee, I'd really like to drive a car that's a lot more environmentally friendly, to be a good role model for my kids.").*

TYING IT ALL TOGETHER

WHAT SHOULD OUR COMPANY'S 90-DAY SALES & MARKETING PLAN LOOK LIKE?

If you've never written a sales and marketing plan before, I wouldn't recommend writing a super-detailed 20-page sales and marketing plan. Instead, this is the moment that you will want to put on your Steven Covey hat, and think like the late, great author. If you've ever read Covey's "7 Habits of Highly Effective People," the second habit states that you should "Begin With The End In Mind [9] ."

The goal of the marketing plan is to get massive amounts of prospective customers into **Awareness**, then **Consideration**, and then the sales plan's goal is to get them through their **Preference** and **Intent** stage, all the way to purchase.

Let's begin the Sales and Marketing plan by figuring out what your "end" should look like.
Let's say your business wants to create £5M in revenue in the next 90 days, and you typically sell £500 worth of product to each customer. This means that you'll need 10,000 deals this quarter.

Assuming that 50% of the proposals[10] or quotes that you write for your customers become closed opportunities, you'll need 20,000 sales-qualified leads.

This means that you'll need somewhere between 40,000 and 60,000 leads, which means that you'll need to make half-a-million to a million people aware of your company.

That big "half-a-million-to-a-million number" is where your marketing plan begins. You see, the marketing plan is the plan to choose various types of media (social media, advertising, PR, outdoor media, etc.) to simply make people aware of your company
- get them into the **Awareness** stage - so that they can then begin to consider your firm in their **Consideration** stage. Your sales plan doesn't even come into play until the customer is in the **Preference** and **Intent** phase because they don't even want to talk to your company until then.

1. **What The "End" Looks Like: Our 90-Day Revenue Goals**
2. **How Many Leads We Will Need**
3. **The Exact Stages Of Our Sales Process & How Long Each Stage Should Take**
4. **The Marketing Channels We Will Use To Obtain The Leads We Will Need**
5. **Who Is Responsible For Each Marketing Channel & How Much Time They Will Spend Per Day On Each Channel**
6. **What Will Our Marketing Content Be Day-By-Day For The Next 90 Days**[11]

9 https://www.stephencovey.com/7habits/7habits-habit2.php

10 If you don't have any numbers on your previous rates of sales success, there may be sales statistics available on-line for your industry. If not, you can simply use your sales and marketing system for 30 days, and re-adjust these projections based on your own experience. Even if your forecast is off-the-mark in the beginning, it can be made accurate in less than a month.

11 If you are planning on using social media, you will need at least 60 pieces of marketing content here, in addition to all of your regular seasonal or monthly marketing campaigns.

WHO SHOULD WRITE IT?

This is rather simple. Your sales and marketing plan should be written by the most senior sales and marketing person on your team. If you're the small business owner and the chief sales professional in the business, then this is one of those few important tasks that should not be outsourced.

WHO WILL EXECUTE IT?

This can be a tough decision for many a small business owner. While you can find subcontractor on a service like oDesk or eLance who will know how to use a program like Infusionsoft for anywhere from £15-45 per hour, creating marketing content is something that you'll likely want to do in-house. Generally speaking, the execution will be split between members of your internal team and outsourced to a subcontractor or two.

WHAT CAN BE OUTSOURCED AND WHAT CANNOT?

Generally, here's the rule of thumb. Content and anything that directly touches your customers should generally be done in-house by an employee of your firm. If you're looking for a person to help run your sales and marketing system or clean out the customer data within it, go ahead and feel good about outsourcing those tasks. On the other hand, if you're looking for someone to write amazing marketing content that will entice prospective customers to go from the **Awareness** stage to the **Consideration** stage, it is far safer to do that in-house. However, there is one exception. If you do decide to work with a copyrighting veteran, you will likely get great content, but most of the best sales copy professionals charge £3-10 per word. If you've got a very large budget, and want to simply do a "brain dump" to a copy genius, you can, but you may be able to get results that are just as good on your own using the copy samples you can get from your software vendor.

WHAT ARE MY NEXT STEPS?

If you want to figure out how you can automate most of the sales and marketing processes in your business and save your company quite a bit of time and money, a sensible next step would be to evaluate a solution that would help you do that. **Click here to view a demo** and see the sales and marketing possibilities for your small business.

About Information Street Ltd

INFORMATION STREET .COM

Information Street Ltd are the UK's (and in fact the World's) leading Infusionsoft partner for Infusionsoft. We train and set up more Infusionsoft applications than any other consultant in the world.

Information Street is a full-service Infusionsoft-centric company. As custom programmers and Infusionsoft experts with years of experience implementing the software, we assist our customers with consulting, application build out, website integrations, API integration and all things Infusionsoft!

About

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Originally Written By Adam Metz - Thank you Adam for your hard work