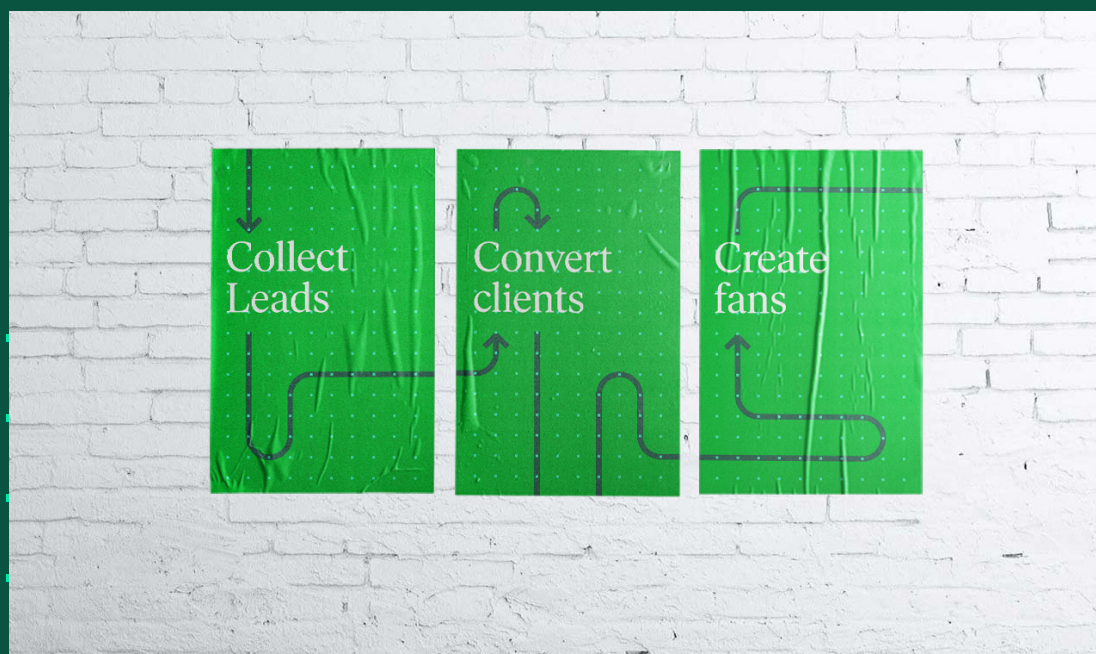


Lifecycle Marketing

keap

personalized growth

planner



Creating a sales and marketing strategy for your small business can be daunting.

It's a strategic plan that includes tactics and tools that are precisely targeted to the audience that you're trying to attract. The Personalized Growth Planner framework has proven ideas and innovative strategies designed to help you get more customers, grow your sales and save time.

This planner contains everything you need to keep your small business on track for the next week, month and year. You can use this planner to record ideas and insights about the biggest opportunities you see in your marketing and sales strategies.

Yes, it will be hard work. And yes, Keap will be right here with you as you do it. Let's create a sales and marketing strategy together, one step at a time.

The personalized growth planner framework will help you get more leads, grow your sales and save time.

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Introduction

Keap's Lifecycle Marketing framework provides a simple model that you can use to collect leads, convert clients and create fans.

Lifecycle Marketing was developed by a team of sales and marketing experts at Keap, and has helped thousands of small businesses achieve success.

The magic of Lifecycle Marketing is in the simplicity of the framework, which can be applied to any small business, regardless of industry or business model. When put into action, Lifecycle Marketing will help you grow sales and give you more time to focus on the things you love.

When put into action, Lifecycle Marketing will help you grow sales and give you more time to focus on the things you can do to improve your business.

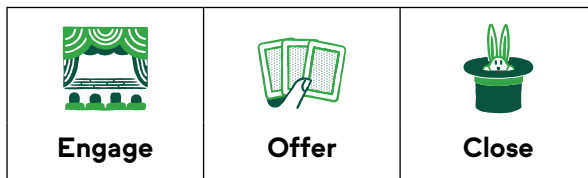
Lifecycle Marketing

Collect Leads



Collecting leads is the first stage of Lifecycle Marketing and includes strategically identifying your audience, creating content that appeals to your target customer, and systematically capturing their information.

Convert Clients



Converting clients is the second stage of Lifecycle Marketing that bridges the transition from a promising lead to a loyal customer.

Create Fans



Creating fans is the last and arguably most key component of Lifecycle Marketing. Depending on the level of execution in this specific area, your customers become more than a transaction; they are your advocates by becoming repeat customers, offering referrals and leaving you positive reviews.



Identify your target audience

As an entrepreneur, you have big dreams. You want the entire world to know your products and services are available to everyone.

It can be easy to spend huge sums of money trying to attract the world to your products and services, only to find that you've overspent your budget and you don't have any new customers.

It's hard to get noticed in this clutter-filled world, but attempting to reach everybody with your product or service is not only inefficient, it's also very expensive. That's why it's important to narrowly define your target customer and meet them where they are.

Who are my ideal customers? (Use demographics such as age, annual income and education level. Use psychographic information such as behaviors, hobbies and values.)

What are their pain points? (Efficiency, ease of use, time, etc.)

Why should they buy from me (and not my competitor)?

What are their most common objections to doing business with me? (Cost, time, etc.)

Who is not my target customer?

Key actions in the next 30 days

Think about the ways you can counter objections and provide value to potential targeted customers.



Attract more customers to your business

Once you know who your target customers are, you'll need to find out where they are most likely to come in contact with your brand, and be receptive to your messaging.

Think about location both online and in person. Are they on a particular social media platform? Do they attend local business events? Are they members of a local community or work in the neighborhood?

After you've identified where they are, start focusing your efforts there. Perhaps this means that you need to join a local networking group, open up a few social media accounts or spend some money on advertising. Be where your customers are and start engaging with them in an authentic, helpful and personable way.

Entice your audience with valuable content that will attract them to your business' website such as webinars, infographics, podcasts, white papers, ebooks, surveys/quizzes, product tutorials and demos, blog posts, coupons or giveaways.

Where do my customers “hang out”? (Social media, online, conferences, etc.)

**What would attract them to my products and services?
(Educational materials, reports, etc.)**

**What lead magnets are currently working? (Coupons, contests,
free trial, etc.)**

New lead magnet ideas: (Videos, samples, etc.)

Key actions in the next 30 days

Consider how existing lead magnet data can be used to better highlight well-performing existing lead magnets and how data can be used to create new lead magnets.

Opportunity analyzer

Number of leads captured from visitors to my website today:

Number of leads captured in 6 months after implementing lead generation strategies on my website

Subtract box 1 from box 2 [Number of leads captured 6 months after implementing lead generation strategies] - [Number of leads captured today] =

Topics to brainstorm

What are some common mistakes that you help people avoid?

- 3 mistakes most people make when [buying their first home, cleaning their pool]
- Do you make these 3 mistakes in [raising your children]?
- 3 common [investing] mistakes you don't know you're making

What are the frustrations people have when they buy from your competitors?

- 3 questions to ask your [pool repair guy] before you hire him
- 3 mistakes that rookie [lawyers] make when [writing wills]
- 3 things to consider when [choosing your pest control company]
- The 3 biggest problems with [public schools]

What are the underlying goals your customers have?

- How to successfully [publish] your [first book]
- 3 things you need to know about [lawn care]
- Proven techniques to [increase your energy]
- What you need to know to [get on the first page of google]
- 5 ways to fix your [scorpion] problem

What are your customers curious about or trying to learn?

- Considerations when [investing] for the first time
- 3 things they should have taught in [college] about [investing]
- How to deal with [bratting kids, nosy neighbors]

Map my lead magnet

Identify your lead magnet gaps and categorize them below.

	Urgent	Not urgent
Important	I need this type of lead magnet yesterday:	I already have this lead magnet and it's working:
Unimportant	I already have this magnet but it's not working I need to trash it:	I don't need this lead magnet:



Capture leads' information to follow up

As you begin attracting more customers to your business, you'll want to make sure you nurture those relationships so your business stays top-of-mind.

Collecting leads involves carefully strategizing lead capture methods that will guarantee success. Gather contact information and organize it in one central place for later follow up.

The first step in lead capture is ensuring your website is relevant and offers value to the target audience. Think of your website as a "lead capture machine," converting prospects into solid customers by moving them through the sales funnel. Your website's homepage is where you'll make your first impression. Make sure its terminology is relevant to your target audience and includes SEO keywords they're searching for. You also want to make sure your business' contact information is accurate and easy to find on the site. If you're going to attract leads by enticing them with a special offer, make it as specific to your target audience as possible so the visitor knows exactly what they're getting and your business doesn't appear too impersonal. Ensure that your content is compelling enough to prompt your visitors to relinquish their contact information willingly and be excited about doing it, knowing they will get something great in return.

How many visitors am I attracting and collecting each month using the following?

Website:

Networking:

Events:

Social media:

Blog:

PPC:

Email campaigns:

SEO/SEM:

Phone:

Walk-in:

Some examples to capture information include:

Discussion board

Webform

Networking events

Lead generation card (on social media)

Have employees ask

Drawing/contest

Demo

Badge scanner

Other lead capture methods:

What can I use to organize potential customers once I have their information? (Database, spreadsheets, CRM, etc.)

Where are my lead collection gaps?

Key actions in the next 30 days

(ie., Audit your website for lead capture opportunities.)



Engage your leads

Once you've pursued a prospect and they decide that your business can fulfill their needs going forward, it's important to nurture that relationship.

This is your opportunity to educate your buyers about your products and services. It's up to you to guide them properly so they look to you as a business they can trust. Instill the confidence in your customers that creates a monopoly in their minds so that they only associate the product or service they need with your business when it is time to engage.

What questions do potential customers have before they buy from me? (Product details, cost, warranty, social proof, etc.)

How can I address those concerns? (Email series, white paper, website, videos.)

Where can I address those concerns? (Blog, social media, newsletters, etc.)

Key actions in the next 30 days

An example here may include creating an FAQ page for your site if you don't already have one. Also, be sure to share that page on the channels where most relevant.



Make the offer

Your offer presentation is the most important step of the sales cycle. In this phase, it is your job as the business owner to showcase your product or service in an informed, professional way that establishes you as the expert in your niche. As your leads express more interest in your product or service, present an offer so compelling that it naturally leads them to the next step, which is closing the deal.

What is my compelling offer? (What solution do I provide that addresses my customers' pain points?)

When should I extend the offer? (After they read the ebook, after a conference, when they initiate a call with a sales rep, etc.)

What does my customer's buying journey look like? (How are buyers getting from step one ("Do I have a need?") to a justified decision?)

How do I know when a prospect is ready to buy?

What are some key objections that I will need to overcome?

What offers work to convert sales?

What happens to everyone else who doesn't decide to purchase right away?

Key actions in the next 30 days

(ie., Brainstorm new offers and implement them.)

Opportunity analyzer

Number of prospects we lose touch with each month because they aren't ready to buy today?

Value of those lost leads:

(Start with the number of leads that don't buy. Multiply that number by the average sale amount.)



Close the deal

Closing the sale involves more than just an exchange of money or signed documents.

In a direct sales conversation, the close involves clear communication, good presence and written documentation. In an ecommerce business, the close involves ensuring that there is a mechanism for collecting payments and processing the order. Regardless of your business type, the close is the signal that the deal has been negotiated and you can now begin the process of delivery (and eventually sell more).

How do customers buy from me? (Online, in person, sales team)

How does my company make it easy to buy?

How can I make it even easier?

What are the top 3 things I can do to improve my selling system?

Key actions in the next 30 days

Think of the ways your customers can currently pay such as PayPal or credit card. Do you need to consider more payment options, for example? Also, consider how automation may play a role in streamlining some of these processes.



Deliver value to each customer

Once it has become apparent that you've accumulated some life-long customers, you need to ensure you've systematized your method to deliver services so that clients consistently get everything they were promised.

Determining what to offer and when to deliver it involves a bit of strategy. The easiest way to do this is to determine how you can help your target customers today and in the future. The solution doesn't have to be your specific product or service nor does it have to result in a sale. Your solution can be as easy as providing tips and resources related to their inquiries. Here are three ways to tactfully increase your revenue while continuing to be helpful:

- Cross sell: Customers aren't always aware of the perfect product or service pairings, and may be willing to purchase related items that enhance their experience.
- Upsell: Listen to your customers and try to understand their needs. They might be willing to pay extra for special treatment, warranties or monthly programs.
- New products: Remember to help your customers by identifying things that will enhance their lives by notifying them of new products or services.

What products do I offer that are often purchased together, or that customers would consider a must-have based on their previous buying history? (Accessories, software)

What are my upsell opportunities? What can I offer as a higher level of service? (Warranty, special treatment, etc.)

What do I do to encourage existing customers to buy new products?

Key actions in the next 30 days

For example, is now a good time to offer a special on additional services? If so, what do those packages look like and how long will you run that special?



Impress your customers

The first step in impressing your customers involves delivering more than what you promised. Your customers become more than a transaction; they are your advocates by becoming repeat customers, offering referrals and leaving you positive reviews.

Think about the last time you were completely impressed by a company. You probably did business with them more than once, and maybe even told a few of your friends about it. Impressing your customers involves going the extra mile to create a memorable, experience that will create customers for life. Satisfy customers by providing the service or product that they pay for in a timely fashion. Then impress them by going above and beyond their expectations and provide additional value.

What are 5 things I can do to impress my customers during the first 30 days? (Send cards, quality and unique packaging, coupons, personal phone call, etc.)

What are 5 things I can do to continue to impress my customers after the first 30 days? (Periodic surveys, birthday cards, holiday announcements, etc.)

What can I do to ensure my customers are enjoying the service or products they paid for? (Follow-up email, survey, customer satisfaction tool, etc.)

How can I find out how my customers are feeling? (Surveys, email, phone call, etc.)

When a customer isn't happy, what can I do to reach out and make the situation better?

Key actions in the next 30 days

Examples may include writing a few survey questions and sending out after each sale to ensure customer satisfaction.

Opportunity analyzer

Number of one-time customers that I could turn into repeat customers by upselling and encouraging them to buy new products.

Lifetime value of a customer:

(Review the number of one time customers and multiply that by the average amount spent by the repeat customer.) =



Multiply with referrals

Asking for referrals and rewarding customers who refer your business to their friends and networks completes the final stage of the creating fans experience.

To guarantee repeat business, positive reviews and customer referrals, you need to encourage recommendations by creating incentives for customers and partners in an effort to grow your client base. Consider establishing a referral program with incentive rewards that are easy to obtain. Providing small gift cards, discounts or movie tickets for referrals is a great way to show your appreciation.

When a customer is happy, how can I ask for referrals, repeat sales or testimonials? (Surveys, cards, etc.)

How do I reward customers who refer? (Surveys, email, phone call, etc.)

What do I do to systematically ask for referrals?

Key actions in the next 30 days

An example might be creating and regularly offering a small incentive to customers who refer people to your business.

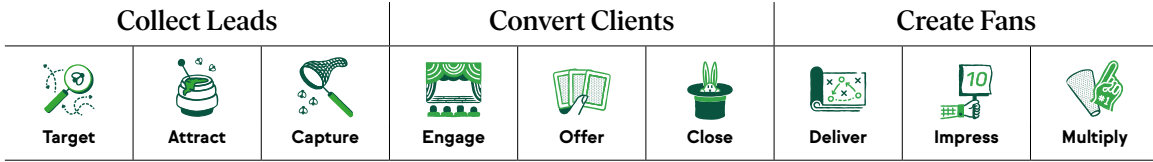
Impress my customers worksheet

- Check the box next to the items that you could use to impress your customers.
- Sparked a new idea? Add additional thoughts in the space provided.

50 Cost-effective ways to impress your customers:

	Fulfill orders on time
	Follow-up with emails
	Answer questions that they pose
	Send a \$5 gift card with every purchase
	Start a rewards or loyalty program
	Provide a surprise discount
	Send a book with a personal note
	Send a pizza or a pizza gift card
	Provide special private shopping hours or prizes during certain hours
	Give them bonus items
	Provide a gift card for an item in your store or on your website
	Send a box of office supplies
	Celebrate an event, such as a birthday or anniversary
	Respond to complaints
	Send a gift card for a free car wash
	Offer free wrapping for purchases
	Provide offers to customers who contribute ideas or engage with your company online
	Send them a Payday candy bar
	Provide group/bulk order opportunities
	Follow them on social media
	Throw a party for all of your customers at your next major event
	Send personalized address labels
	Give a night out at the movies
	Celebrate a milestone, such as number of years as a customer
	Call them and say thank you
	Send a handwritten thank you note

	Send a lottery ticket with every purchase
	Feature a customer on your website
	Meet up with customers in the cities that you are visiting
	Donate on behalf of your customer
	Plant a tree on behalf of your customer
	Send cookies, fruit, or flowers
	Randomly select a few customers to receive a product that you upsell
	Provide an upgrade for free
	Send them swag with your company logo on it
	Schedule lunch at your office and invite customers to attend and share feedback
	Send a small gift
	Give them a free song download
	Include a free USB flash drive with their order
	Send a laminated reference guide or chart
	Create a video message and send it via email
	Tell your customers how their feedback was implemented
	Upgrade their shipping to priority mail
	Offer free shipping
	Pre-order exclusive items
	Give them an inexpensive photo album
	Provide a make-over related to your product
	Send them a travel mug filled with tea



Getting started

Review the questions in each of the 3 phases. Select each statement where the answer is yes. Assign one point to each of those statements and total your score for each phase. The phase with the lowest score should be your starting point in building your Lifecycle Marketing strategy. If there is no clear phase to begin with, we recommend that you start with the Collecting Leads phase.

Collect Leads

<input type="checkbox"/>	I'm clear about who my target audience is.
<input type="checkbox"/>	I know the pain points of my target audience.
<input type="checkbox"/>	I understand what my target audience cares about.
<input type="checkbox"/>	I'm clear about who is not my target audience.
<input type="checkbox"/>	I understand what makes my business stand out from the crowd.
<input type="checkbox"/>	I know where my customers 'hang out'.
<input type="checkbox"/>	I have a formal process for generating leads.
<input type="checkbox"/>	I currently utilize lead magnets to attract traffic to my business.
<input type="checkbox"/>	I use more than 2 types of lead magnets.
<input type="checkbox"/>	I utilize social media to attract traffic to my business.
<input type="checkbox"/>	I have a formal process for collecting prospect information.
<input type="checkbox"/>	I have a system to organize potential customers once I have their information.

<input type="text" value=""/>	← TOTAL POINTS
-------------------------------	----------------

Convert Clients

	I anticipate questions that potential customers have before they buy from me.
	I have a clear content strategy.
	I have clarity around my compelling offer.
	I know how potential customers make decisions on what and when to buy.
	I understand my customer's buying journey.
	My sales process is mapped to my customer's buying process.
	I have a system in place to identify when someone is ready to buy.
	I understand what offers work to convert sales.
	I have a clear process for closing the sale.
	It's easy to buy from me.
	My sales team has been fully trained on sales procedures.
	I have a strategic plan for making it even easier to buy from me.

	← TOTAL POINTS
--	----------------

Create Fans

	I have a consistent plan to wow my customers.
	I fulfill on time or early if possible.
	I provide a quality service or product.
	I send a personal thank you note to customers.
	I send a small thank you gift to customers.
	I call my customers to check-in and thank them.
	I have a process to generate repeat sales.
	I have a customer loyalty program.
	I offer additional product/service at the point of sale.
	I have a formal referral program.
	I have a process to ask every customer for referrals.
	I have a formal incentive program to reward people who refer others.

	← TOTAL POINTS
--	----------------

Map your lifecycle marketing strategy

Based on your results in the “Getting Started” section and in each individual section, define your desired goals for the next 30 days. Use this section to map your strategy for each of the 9 stages. Once you’ve begun to implement your new Lifecycle Marketing strategy, you need to track your progress. Use this data to determine where to improve upon your strategy.



Target



Attract



Capture



Engage



Offer



Close



Deliver



Impress



Multiply

Keap is the leading sales and marketing software built for small businesses. Our software, services and educational content help small businesses get organized, grow sales and save time. By combining sales and marketing tools in one system, we help entrepreneurs save time and simplify operations. Learn more at [Keap.com](https://www.keap.com).