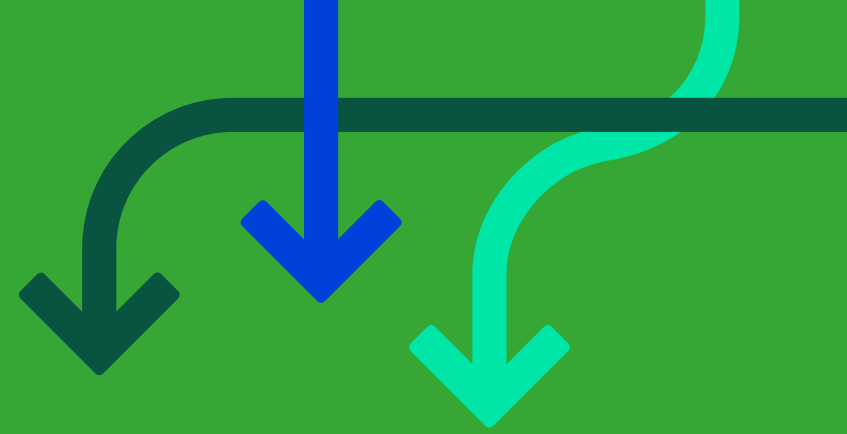




Small Business Success Method



Assess

Assess the sales and marketing of a single product or service that your business sells. Your Assessment will reveal opportunities for improvement while providing a narrow scope and focus to deliver incremental improvement to your sales and marketing reports.

Plan

Directly addressing the gap in your sales and marketing efforts, identify a single and narrow strategy and tactic to launch in your business. Create an Action Plan that lays out the assets, content, tools, skills, time-line, and owners required to execute and launch the tactic in your business.

Execute

Use your content and assets to build the sales and marketing automation within Keap. Creatively address business needs using automation while staying focused on a lean tactic that gets you started. At the end of this phase, you'll Test Launch the tactic to a segment of your contacts.

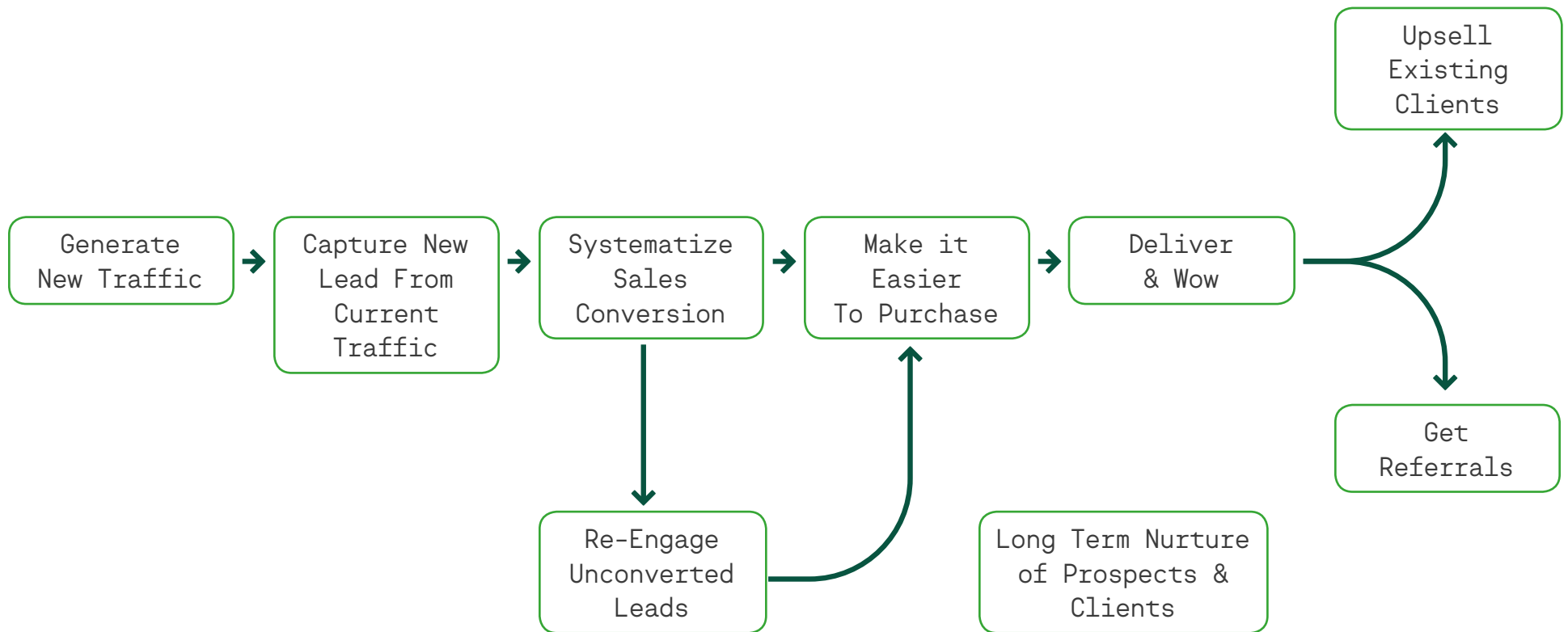
Optimize

After the test launch of your tactic, ensure you have a reporting dashboard to monitor the performance of your sales and marketing process. You'll optimize your content and process to allow for a broader launch of your tactic in your business.

Progress

Chart your next move by reassessing your needs and developing your next Action Plan for continued success. You'll feel empowered and confident in repeating the process to continue to see incremental improvements in your business.

The perfect customer lifecycle



Sales and marketing assessment

What is your biggest goal right now?

(What aspirations or pains keep you up at night?)

Select one product/service offering to focus on

Focus on one product or service that you currently sell. This could be a best seller or something that needs improvement.

Define one ideal customer you sell to - be specific

Of course we want to sell “everyone”, but narrowing our focus helps use create more targeted content and marketing.

Sales and marketing assessment

What is your value proposition?

Summarize why your ideal customer buys this product or service and specifically from your company.

What does this offering help your customers achieve?

These are the positive things you will assist your customers with like growing, improving, or maximizing in some way.

What does this offering help your customers avoid?

Think of this as the “pain” or negative things you are helping your customers solve. Wasting time, losing money...?

Now, let's translate and organize the sales and marketing efforts for your Core Product Offering into the Lifecycle Marketing framework to identify future plans, gaps, and opportunities to grow sales and/or save time.

Focus on **one core product and one market segment** to allow you to soft launch a tactic that addresses any gaps or gets you closer to future plans.

	Gather Leads	Engage/Sell	Deliver & Wow	
Current	<p>How does your target customer find you?</p> <p>Where do you get leads from?</p> <p>Once you have a lead, how do you store their information?</p> <p>What is the size of your contact list and how often are you contacting them via email?</p>	<p>How many leads (of this target customer) are you generating per month?</p> <p>How many close quickly?</p> <p>What, if anything, do you offer potential customers before they buy – such a consultation, free quote, free gift or report, etc?</p>	<p>How do your customers pay for your core product offering?</p> <p>What much income is generated by this core product offering?</p> <p>What were last year's revenues?</p>	<p>What, if anything, can you upsell when selling this core product?</p> <p>How do you generate referrals from your current customer base?</p> <p>How do you know if your paying customers are satisfied? How do you know how to improve?</p> <p>How do you stay in touch with your customers after they pay you?</p>
Future	<p>Identify lead magnets – free reports and papers, free gifts, etc. that focus on away language that can be used to capture lead information and trigger follow-up.</p>	<p>Identify gaps and opportunities in the current follow-up process – is there a “free” offer to measure engagement? Are they asking for the sale immediately (versus progressive follow-up)?</p> <p>Initial communication should build value and trust and good follow-up should eventually build up to 7-9 touchpoints.</p>	<p>Identify sales automation opportunities and quote tracking.</p> <p>E-commerce for one-time and recurring payments and upsells</p>	<p>Finally ask for referrals and incentivize happy customers to generate new business.</p> <p>Ask customers for feedback to continually improve your product and processes.</p> <p>Give customers the opportunity to enhance the sale via upsells, upgrades, and the ability to buy again easily.</p>

Gather Leads

Engage/Sell

Deliver & Wow

Current

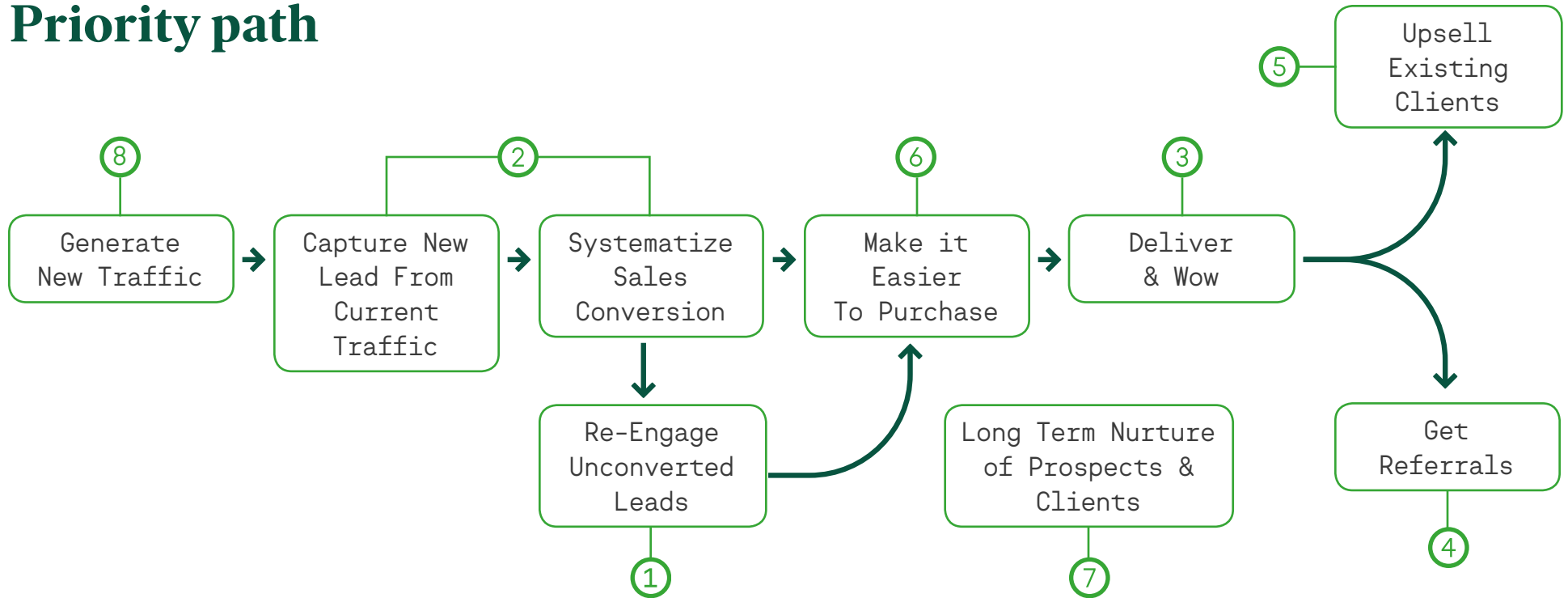
Gather Leads

Engage/Sell

Deliver & Wow

Future

Priority path



How to prioritize the work

- | | | | | | | | | |
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| <p>1</p> <p>Re-Engage Existing List</p> <p>Drive our existing prospects to take action! Our quickest path to cash.</p> | <p>2</p> <p>Capture Leads From Existing Traffic</p> <p>Create lead magnets or offers that entice your visitors to opt-in to your marketing.</p> | <p>3</p> <p>Systematize Your Sales Conversion</p> <p>Be intentional in seeking to convert our newest leads that enter the funnel.</p> | <p>4</p> <p>Deliver A Stellar Customer Experience</p> <p>More than simply fulfilling on your offering. Make your customers feel awesome.</p> | <p>5</p> <p>Ask Happy Customers for Referrals</p> <p>Find out who your happy customers are and ask them to refer their friends and colleagues.</p> | <p>6</p> <p>Upsell To Existing Customers</p> <p>What else do we offer that will help our clients?</p> | <p>7</p> <p>Make it Easier To Purchase</p> <p>Remove barriers and streamline our sales process to avoid losing customers.</p> | <p>8</p> <p>Nurture Your Prospects and Clients</p> <p>Schedule regular communications to keep your list up to date on what is new and exciting.</p> | <p>8</p> <p>Generate New Traffic</p> <p>Introduce your business to new people through advertising, events, or networking.</p> |
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Additional notes