OPTIMIZE
YOUR SALES & MARKETING FUNNEL

Webinars
Brand Advertising
Email Marketing
Sales
Social Media
PR
Events
Tradeshows
HOW TO FIND

PROBLEMS...

... AND CREATE

SOLUTIONS
EVERY BUSINESS HAS A
SALES FUNNEL
BUT EVEN IF YOU ARE MICROSOFT, CISCO, ORACLE, OR GOOGLE YOUR FUNNEL WILL HAVE BLOCKAGE POINTS
WE’RE GOING TO LOOK AT HOW TO
FIND AND ELIMINATE THOSE BLOCKAGE POINTS
AND IN THE PROCESS, HELP
GREATLY INCREASE YOUR SALES
BUT FIRST LET’S LOOK AT SOME BEST PRACTICES FOR DESIGNING YOUR FUNNEL. I CALL THIS “BUILDING A SALES & MARKETING MACHINE”
WHAT IS A

“SALES & MARKETING MACHINE”
PREDICTABLE

SCALABLE

AUTOMATED

SALES & MARKETING MACHINE 9

CLEARLY DEFINED LEVERS THAT YOU PULL TO MAKE IT GO FASTER

INSTRUMENTED WITH GREAT METRICS

COST OPTIMIZED
HOW DO YOU GO ABOUT BUILDING ONE OF THOSE?
9 STEPS
WHY 4 FIRST?

BECAUSE 1, 2 AND 3 ARE NOT OBVIOUS SO WE WILL COME BACK TO THEM AT THE END AFTER WE HAVE SEEN WHY THEY ARE SO VALUABLE
ALIGN EVERY MARKETING ACTIVITY AROUND ONE GOAL...
CREATING LEADS THAT HELP SALES
CLOSE MORE DEALS
Blogging
Social Media
SEO
SEM
PR
eMail Campaigns
Webinars
Sales
CLOSED DEAL
RULE NUMBER 1

If it doesn’t create a lead, or directly contribute towards closing a sale, *it doesn’t belong*
RULE NUMBER 2

If the cost per lead is too high, it doesn’t belong

Exception to this rule: If you can recover cost through:

• higher conversion rate to closed deals
• higher average deal size
1. At the end of every action, there should be a clear link to the next action
2. The overall flow from start to finish should be carefully designed
3. Every action should contribute clearly to moving the lead through the closed deal
AN ORGANIZATIONAL STRUCTURE...
YOUR CUSTOMER’S PURCHASING STAGES

- Awareness
- Consideration
- Purchase
- Closed Deal
AN ORGANIZATIONAL METAPHOR FOR THE KEY FUNNEL STAGES
WHAT IS TOP OF THE FUNNEL?

GENERATE AWARENESS

- Customer is not aware they have a problem, or that your product category exists

GET FOUND

- Customer has a problem and is looking for a solution
WHAT IS TOP OF THE FUNNEL?

- GENERATE AWARENESS
- WEBSITE
- RAW LEAD
WHAT IS TOP OF THE FUNNEL?

GENERATE AWARENESS & GET FOUND

Inbound marketing
• Blogging
• SEO/SEM
• Social Media
• Influencer Campaigns
• Blogs, Press & Articles
• etc.

Outbound marketing
• Cold Calling
• etc.

WEBSITE

RAW LEAD
WHAT IS THE MIDDLE OF THE FUNNEL?

NUFUTURE
QUALIFY
MQL (MARKETING QUALIFIED LEAD)
WHAT IS THE MIDDLE OF THE FUNNEL?

NUPTURE
- Webinars
- Free Trials
- eMail Campaigns
- Newsletters
- etc.

QUALIFY

MQL (MARKETING QUALIFIED LEAD)
PROBLEM:

SALES SAYS MARKETING ISN’T GIVING THEM ENOUGH LEADS

MARKETING SAYS THAT’S RIDICULOUS, I GAVE THEM A TON OF LEADS. THEY JUST DON’T FOLLOW UP ON THEM PROPERLY.
CAUSE:

SALES CALLS A FEW UNQUALIFIED LEADS, AND FINDS THEY ARE WASTE OF TIME - THEY STOP CALLING THE REST OF THE LEADS
SOLUTION:

GET AGREEMENT ON THE QUALIFICATION CRITERIA NEEDED TO BE ABLE TO PASS A LEAD ACROSS TO SALES (MQL)
SALES FURTHER QUALIFIES THOSE LEADS TO FIND OPPORTUNITIES
USING BANT

BUDGET
AUTHORITY
NEEDS
TIMING
COMMON LEAD STATES

RAW LEAD

MQL (MARKETING QUALIFIED LEAD)

OPPORTUNITY (SALES QUALIFIED LEAD)

CLOSED DEAL
6 AUTOMATE
AUTOMATE THE KEY FUNNEL STAGES

TOP OF THE FUNNEL
- CREATING AWARENESS
- & DRIVING TRAFFIC

MIDDLE OF THE FUNNEL
- NURTURING & QUALIFYING

SALES
- SELLING & CLOSING

CLOSED DEAL
CLOSED DEAL

TOP OF THE FUNNEL
INBOUND MARKETING

MIDDLE OF THE FUNNEL
MARKETING AUTOMATION

SALES
CRM
## Landing Pages

- **Number of Landing Pages**: 498
- **Total Page Views**: 1,834,309
- **Total Form Submissions**: 527,483
- **Total Conversion Rate**: 28.76%

### Table

<table>
<thead>
<tr>
<th>Page</th>
<th>Views</th>
<th>Submissions</th>
<th>Conversion Rate</th>
<th>Lead Nurturing Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media for Broadcast</td>
<td>36,274</td>
<td>18,241</td>
<td>50.29%</td>
<td>Website-Related</td>
</tr>
<tr>
<td>Website Redesign</td>
<td>47,370</td>
<td>17,908</td>
<td>37.8%</td>
<td>Website-Related</td>
</tr>
<tr>
<td>Karma Marketing Blueprint</td>
<td>58,651</td>
<td>17,681</td>
<td>30.15%</td>
<td>Website-Related</td>
</tr>
<tr>
<td>Human Insurance Blogging in Africa</td>
<td>30,900</td>
<td>17,331</td>
<td>56.09%</td>
<td>Website-Related</td>
</tr>
<tr>
<td>Social Media Marketing Job</td>
<td>29,917</td>
<td>15,118</td>
<td>50.53%</td>
<td>Social Media-Related</td>
</tr>
</tbody>
</table>

### Landing Page Wizard

Choose a layout

1 2 3 4 5 6

Next >>
Lead Nurturing: Create a Campaign

Choose campaign name and which forms are associated with a campaign

Step 1: Create Campaign  Step 2: Compose Email  Step 3: Preview and Test

Campaign name:

(e.g. Webinar Download, Trial Request, Contact Us)

Email footer:

Your company name

Street, City, State 00000

(The email footer will appear at the bottom of every email in this campaign.)

What form should trigger this campaign? (optional)

<table>
<thead>
<tr>
<th>FORM NAME</th>
<th>ASSOCIATED WITH CAMPAIGN</th>
<th>APPEARS ON PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Scoop</td>
<td></td>
<td>1 page</td>
</tr>
<tr>
<td>SEO in 2010 - Free Marketing Webinar by Mike Volpe</td>
<td>Contact Form</td>
<td>1 page</td>
</tr>
<tr>
<td>Contact Mike-Volpe via Email</td>
<td>Welcome</td>
<td>1 page</td>
</tr>
</tbody>
</table>

Create New Campaign  or  cancel
## Lead Nurturing: Reports

<table>
<thead>
<tr>
<th>CAMPAIGN</th>
<th>UNIQUE CLICKS</th>
<th>% CLICKED</th>
<th>% UNSUB</th>
<th>SENT TOTAL</th>
<th>LAST 3 DAYS</th>
<th>YESTERDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website-Related</td>
<td>2264</td>
<td>1.74%</td>
<td>0.46%</td>
<td>130,403</td>
<td>3,831</td>
<td>1,358</td>
</tr>
<tr>
<td>Social Media-Related</td>
<td>3864</td>
<td>2.48%</td>
<td>0.39%</td>
<td>155,580</td>
<td>1,310</td>
<td>479</td>
</tr>
</tbody>
</table>
"IF YOU CAN NOT MEASURE IT, YOU CAN NOT IMPROVE IT."
- LORD KELVIN
THE KEY METRICS

CAMPAIGNS TO DRIVE TRAFFIC

OVERALL CONVERSION %
(BY LEAD SOURCE)

VISITORS

CONVERSION %

TRIALS

CONVERSION %

CLOSED DEALS

CONVERSION %
<table>
<thead>
<tr>
<th>SOURCES</th>
<th>VISITS</th>
<th>VISIT TO LEAD</th>
<th>LEADS</th>
<th>LEAD TO CUSTOMER</th>
<th>CUSTOMERS</th>
<th>VISIT TO CUSTOMER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic Search</td>
<td>27,857</td>
<td>4.5%</td>
<td>1,264</td>
<td>2.7%</td>
<td>34</td>
<td>0.12%</td>
</tr>
<tr>
<td>Referrals</td>
<td>58,751</td>
<td>11%</td>
<td>6,513</td>
<td>0.74%</td>
<td>48</td>
<td>0.08%</td>
</tr>
<tr>
<td>Paid Search</td>
<td>7,966</td>
<td>10%</td>
<td>805</td>
<td>1.5%</td>
<td>12</td>
<td>0.15%</td>
</tr>
<tr>
<td>Direct Traffic</td>
<td>159,735</td>
<td>1.9%</td>
<td>3,095</td>
<td>2.1%</td>
<td>66</td>
<td>0.04%</td>
</tr>
<tr>
<td>Email Marketing</td>
<td>32,041</td>
<td>18%</td>
<td>5,767</td>
<td>0.59%</td>
<td>34</td>
<td>0.11%</td>
</tr>
<tr>
<td>Social Media</td>
<td>11,314</td>
<td>6.8%</td>
<td>773</td>
<td>1.9%</td>
<td>15</td>
<td>0.13%</td>
</tr>
<tr>
<td>Other Campaigns</td>
<td>35,726</td>
<td>27%</td>
<td>9,679</td>
<td>0.69%</td>
<td>67</td>
<td>0.19%</td>
</tr>
<tr>
<td>Totals</td>
<td>333,390</td>
<td>8.37%</td>
<td><strong>27,896</strong></td>
<td>0.99%</td>
<td><strong>276</strong></td>
<td>0.08%</td>
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</tbody>
</table>
ANALYZE
IDENTIFY
YOUR BLOCKAGE POINTS
HOW?
WHAT IS STOPPING ME FROM INCREASING SALES BY 5X?
<table>
<thead>
<tr>
<th>SOURCES</th>
<th>VISITS</th>
<th>VISIT TO LEAD</th>
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<td>0.08%</td>
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</tbody>
</table>
Leads from Social Media

Jan 2009 | Feb 2009 | Mar 2009 | Apr 2009

Conversion ratio
<table>
<thead>
<tr>
<th>SITE</th>
<th>VISITS</th>
<th>VISIT TO LEAD</th>
<th>LEADS</th>
<th>LEAD TO CUSTOMER</th>
<th>CUSTOMERS</th>
<th>VISIT TO CUSTOMER</th>
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<tbody>
<tr>
<td>Twitter</td>
<td>3,964</td>
<td>4.2%</td>
<td>168</td>
<td>2.4%</td>
<td>4</td>
<td>.1%</td>
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<tr>
<td>LinkedIn</td>
<td>3,162</td>
<td>9.6%</td>
<td>303</td>
<td>1.7%</td>
<td>5</td>
<td>.16%</td>
</tr>
<tr>
<td>Facebook</td>
<td>3,145</td>
<td>8.9%</td>
<td>281</td>
<td>1.8%</td>
<td>5</td>
<td>.16%</td>
</tr>
<tr>
<td>StumbleUpon</td>
<td>355</td>
<td>.28%</td>
<td>1</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Delicious</td>
<td>262</td>
<td>1.1%</td>
<td>3</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>YouTube</td>
<td>138</td>
<td>2.9%</td>
<td>4</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>SlideShare</td>
<td>136</td>
<td>4.4%</td>
<td>6</td>
<td>17%</td>
<td>1</td>
<td>.74%</td>
</tr>
<tr>
<td>Wikipedia</td>
<td>57</td>
<td>7%</td>
<td>4</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
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<tr>
<td>Ning</td>
<td>43</td>
<td>7%</td>
<td>3</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
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</tbody>
</table>
### Visitors

<table>
<thead>
<tr>
<th>Month</th>
<th>Visits</th>
<th>Visit to Lead</th>
<th>Leads</th>
<th>Lead to Customer</th>
<th>Customers</th>
<th>Visit to Customer</th>
<th>Visits by Month</th>
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</thead>
<tbody>
<tr>
<td></td>
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### Leads

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### Sales

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<tr>
<th>Month</th>
<th>Visits</th>
<th>Visit to Lead</th>
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<th>Lead to Customer</th>
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<th>Visit to Customer</th>
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</tbody>
</table>

### SEO

<table>
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<tr>
<th>Month</th>
<th>Visits</th>
<th>Visit to Lead</th>
<th>Leads</th>
<th>Lead to Customer</th>
<th>Customers</th>
<th>Visit to Customer</th>
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</tbody>
</table>

### Social Media

<table>
<thead>
<tr>
<th>Month</th>
<th>Visits</th>
<th>Visit to Lead</th>
<th>Leads</th>
<th>Lead to Customer</th>
<th>Customers</th>
<th>Visit to Customer</th>
<th>Visits by Month</th>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
IMPROVE
IN DIAGNOSING MANY FUNNEL BLOCKAGE POINTS, I HAVE FOUND THAT THERE IS A CLEAR PATTERN...
YOU ARE HOPING YOUR CUSTOMERS WILL DO SOMETHING THAT THEY ARE NOT MOTIVATED TO DO
IN OTHER WORDS…

YOU DESIGNED YOUR FUNNEL THE WAY YOU HOPED IT WOULD WORK…

BUT YOU MAY NOT HAVE THOUGHT ENOUGH ABOUT THE CUSTOMER’S POINT OF VIEW
JBOSS EXAMPLE

PUT A REGISTRATION FORM ON THEIR WEB SITE BEFORE A FREE DOWNLOAD

IMPACT

CUT THE DOWNLOAD RATE BY MORE THAN 10X
GET INSIDE YOUR CUSTOMER’S HEAD

CONCERNS
- Hate being sold to
- Find it offensive to give name and email
- Don’t want to get spam sales emails
- Worried that email address will be given to other marketers
UNDERSTAND WHAT MOTIVATES THEM

- Want to solve my problem
- Recommendation from a friend
- Education
- Data/information reports
- Entertainment
- Free stuff
- Meeting other people like me that have insights to share
CREATE A SOLUTION THAT ENTICES THEM AND ADDRESS THEIR CONCERNS

- Customer testimonials address vendor risk
- Free trials address product viability and fit concerns
- Lowest price guarantees
- **FREE** open source software
- downloaded **5 MILLION** times
- selling documentation **$27,000** per month
NEEDED: a carrot to incent them to provide an email address

SOLUTION: give away the documentation for free

RESULT: 10,000 leads per month
EXAMPLE: DRIVING TRAFFIC TO YOUR WEB SITE

GETTING FOUND

Not going to find your site unless:

- On top page of Google search results
- Recommended by a trusted source
- Referred to in social media or blogosphere
Website Grader by HubSpot - Marketing Reports for 2,000,000 URLs and Counting...

Website URL
Ex: www.yourcompany.com

Competing Websites
(Optional) Enter websites of competitors to include in analysis

Your E-Mail
Enter your e-mail address to receive the final report

Send me updates from HubSpot on Internet Marketing and SEO (about 2 emails per month). We won’t sell, rent or share your email address. Privacy policy

Generate Report
HubSpot's Website Grader

Report for www.foreentrepreneurs.com

February 10, 2010 at 10:06 AM

The website www.foreentrepreneurs.com ranks 96,774 of the 2,068,415 websites that have been ranked so far.

A website grade of 95.3/100 for www.foreentrepreneurs.com means that means that of the millions of websites that have previously been evaluated, our algorithm has calculated that this site scores higher than 95.3% of them in terms of its marketing effectiveness. The algorithm uses a proprietary blend of over 50 different variables, including search engine data, website structure, approximate traffic, site performance, and others.

I. Create Content

Every web page has the potential to rank well in search engines and draw traffic from other sources, like social media sites and the blogosphere. Of course, whether a page draws traffic (and links) depends on whether it's optimized and how remarkable (useful, interesting, etc.) it is. But in general, most pages do "ok" and contribute to the cause, so it's both a quality and a quantity game.

A. Blog Analysis

Blogging is a great way to reach your target audience with your thoughts, opinions, and offerings on relevant topics.

✔ Blog Found

LESSONS FROM WEBSITE GRADER

• Free tools drive viral spread
• Low customer work required
• High value delivered
• Score leverages competitive urge
• Builds trust through clear demonstration of expertise
GOOD LINKAGE TO NEXT STEP

Need to Improve Your Website Grade?

Try our Free Internet Marketing Kit
HubSpot, the developers of Website Grader, offer a free kit of marketing tips about how to improve your website so you can get found by more prospects and convert more of them to leads and paying customers.

HubSpot

Want Feedback on Your Website Grade?

Live Website Optimization: Using Website Grader For Marketing Success
Join HubSpot Experts for a live session for website review and optimization, providing tips for getting found online.

Date and time: Every Tuesday at 1:00pm ET
Submit your site now for optimization by HubSpot Experts! (2 will be selected)
using engineering for marketing
USING DATA TO DRIVE WEB TRAFFIC

SYSOMOS: SOCIAL MEDIA MONITORING

LEVERAGED THEIR DATABASE TO CREATE BLOG POSTS WITH DATA ON TOPICS OF CURRENT INTEREST:

- IRAN ELECTION RIOTS
- TWITTER’S GROWTH
- FACEBOOK USAGE
LED TO:

SYSOMOS ARTICLES IN ECONOMIST, NY TIMES

WEB TRAFFIC TO READ THE FULL REPORT

LEADS – IMPRESSED BY THE CAPABILITIES OF THE SOFTWARE
GETTING CUSTOMERS TO SIGN UP FOR A TRIAL

- I don’t have the time
- I don’t want to get spam email
- Yet another password to remember
RE-THINK THE PROCESS

CONVENTIONAL APPROACH

SIGN UP FOR TRIAL → WOW! → CONVERT TO CUSTOMER

WOW! FIRST, REGISTER LATER

WOW! → SIGN UP FOR TRIAL → CONVERT TO CUSTOMER

Source: Josh Porter – Designing for Social Traction
is the dead simple place to post everything. just email us.

step 1 | Create an account.
Skip it! No setup or signup

step 2 | Email anything to post@posterous.com
Attach photos, video, MP3's, and files

step 3 | See the site you made
We reply instantly with your new posterous at
http://yourname.posterous.com

“it's just so simple.” -- Leo Laporte, Net@Night podcast

Try it now by emailing post@posterous.com from

GMail  Windows Live Hotmail  Yahoo! Mail  AOL mail

...or any other mail program. Posterous works wherever you have email.

Email post@posterous.com »

Or see what others are posting...

Explore thousands more »
is the dead simple place to post everything. just email us.

step 1 | **Create an account.**
Skip it! No setup or signup

step 2 | **Email anything to post@posterous.com**
Attach photos, video, MP3’s, and files

step 3 | **See the site you made**
We reply instantly with your new posterous at
http://yourname.posterous.com

“**It’s just so simple.**”  — Leo Laporte, Net@Night podcast

**Try it now by emailing post@posterous.com from**

Gmail  Windows Live Hotmail  Yahoo! Mail  AOL mail

... or any other mail program. Posterous works wherever you have email.

Email post@posterous.com »

**Or see what others are posting...**

[The AirnB Blog](#)
[barang’s internet scratch pad](#)
[The Official Posterous](#)
[gary’s posterous](#)
[Mixpanel - Analytics for startups](#)
[Gov. Arnold Schwarzenegger](#)

Explore thousands more »
PROBLEM: GETTING A MEETING
GETTING TO EXECUTIVE DECISION MAKERS

4th Annual Claims Innovation Summit

Date: Monday, February 8, 2010 - Wednesday, February 10, 2010

Location: The Ritz Carlton, Dove Mountain, AZ

Regarded as the premier thought-leadership forum for property claims, the 2010 Claims Innovation Summit will be held at the new Ritz-Carlton, Dove Mountain near Tucson, AZ. The Summit brings innovators from some of the nation's top carriers together to participate in seminar sessions and to hear from cutting edge thinkers.

TECHCRUNCH FOR INSURANCE CLAIMS
USING FREEMIUM

DROPBOX: SIMPLE FILE SHARING SOFTWARE
- Get you hooked for free
- Storage slowly increases to the point where you need to pay
- But by then they have established trust
  - And it is hard to move your data that is shared with others

THE PRODUCT PULLS THE CUSTOMER THROUGH THE FUNNEL STEPS
First Contact → Build Relationship → Build Trust → Sell
First Contact → Build Relationship → Build Trust → Sell

Build Trust

Sell
SELLING IS 10X EASIER…
ONCE YOU HAVE ESTABLISHED TRUST
YOUR BLOG CAN ESTABLISH TRUST...

HOW?
VALUABLE CONTENT

EDUCATION
INFORMATION
ENTERTAINMENT

WITH ZERO SELLING
THE KEYS TO SUCCESS

DEEP UNDERSTANDING OF YOUR CUSTOMER

• What don’t they like?
• What do they like/need?
• What motivates them?
• What are their problems?
• What does their boss expect of them?
• etc.

Combined with

OUT-OF-THE-BOX THINKING
APOLOGIES

MY EXAMPLES ARE ALL SOFTWARE COMPANIES

THIS APPLIES EQUALLY WELL IN OTHER BUSINESSES
FINALLY...

LET’S GO BACK TO THE BEGINNING...
...AND INTRODUCE
THREE NEW STEPS AT
THE BEGINNING OF
THE FUNNEL DESIGN
PROCESS...
IDENTIFY

IDENTIFY ALL THE PEOPLE INVOLVED IN THE PURCHASE DECISION
2

UNDERSTAND

SKETCH OUT THEIR BUYING PROCESS AND CONCERNS AT EACH STAGE
3 ENTICE

ADD THE STEPS TO ADDRESS THEIR BUYING PROCESS

AND:
ADDRESS THEIR CONCERNS
ENTICE THEM
WE WENT FROM THIS:

1. Align
2. Link
3. Automate
4. Measure
5. Analyze
6. Improve
TO THIS…

1. IDENTIFY
2. UNDERSTAND
3. ENTICE
4. Align
5. Link
6. Automate
7. Measure
8. Analyze
9. Improve
<table>
<thead>
<tr>
<th></th>
<th>THE NINE STEPS</th>
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<tbody>
<tr>
<td>1</td>
<td>IDENTIFY</td>
<td>Identify people in purchase decision</td>
</tr>
<tr>
<td>2</td>
<td>UNDERSTAND</td>
<td>Address their buying process and concerns</td>
</tr>
<tr>
<td>3</td>
<td>ENTICE</td>
<td>Design actions to pull them through buying process &amp; address concerns</td>
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<tr>
<td>4</td>
<td>ALIGN</td>
<td>Ensure funnel actions lead directly to sales</td>
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<tr>
<td>5</td>
<td>LINK</td>
<td>Link every funnel action to the next step</td>
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<td>6</td>
<td>AUTOMATE</td>
<td>Use software to automate</td>
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<td>7</td>
<td>MEASURE</td>
<td>Measure key funnel metrics</td>
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<tr>
<td>8</td>
<td>ANALYZE</td>
<td>Identify blockage points</td>
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<tr>
<td>9</td>
<td>IMPROVE</td>
<td>Brainstorm better enticements and ways to address concerns</td>
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SALES-DRIVEN FUNNEL DESIGN TO A CUSTOMER-CENTRIC FUNNEL DESIGN