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Target, Connect, Convert

4 STEPS TO MARKET DOMINATION

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- Review Findings & Build Buy-In

Step 2

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WELCOME TO AUTOMATED SALES GROWTH!

Cliche alert: "The Internet has changed everything!"

Yes, it is a cliche but, it is as true as most cliches. In the game of finding potential customers, connecting with them and building relationships of trust and profit, the Internet has destroyed boundaries and limitations that traditional sales strategies are founded on.

Imagine for a moment the vast multitudes of potential customers for your business that exist in the world. Yes, I said the world! Imagine all of them. Take a deep breath and let it sink in... That's really why you're in the business you're in isn't it?

There are thousands or millions of people and businesses that are challenged or limited in ways that your company can help them overcome. With the tools available to even the smallest businesses today, you can reach ALL of them without spending a lot of money.

So, if you're still thinking of your sales strategy as if you're a general commanding individual sales platoons, that go out every day and conquer one more hill, you're thinking WAY TOO SMALL!

If you're a large business with a market leading position and lots of long time existing customers, don't let yourself believe that your competitors are approaching your customers the way you did. ***Someone in your market will exploit the ability to use technology to reach your customers by the thousands and begin to dominate. The only question is whether it will be you or someone else.***

This guide short and simple but, could be one of the most powerful tools you'll use in the next several years to dominate new markets or protect your advantage in existing markets.

Someone in your market will exploit the ability to use technology to reach your customers by the thousands and begin to dominate.

Bad News alert: You're going to have to let go of some long held assumptions:

- I'm too busy. I'm so busy working with the team and customers I have now that I can't stop and re-engineer my processes or learn a new way of marketing and selling.
- Email marketing is for spammers and doesn't fit into a long term relationship with high value customers.
- My team won't be able to adapt to this new approach. They're too set in their ways, too old, etc.

Worse News alert: It's not a matter of IF, only a matter of WHEN.

Your competitors are probably already implementing approaches like this. Whether you're a new startup, a regional player or the market leader today, the future belongs to the businesses that can connect with the entire marketplace, brand themselves positively and engage potential customers using technology.

Now for the Good News:

1. Most of the hesitance you and your team feel about implementing the types of changes described in this guide is unfounded.
2. It's not going to be as difficult as you imagine. That's the point of this guide! We've been helping businesses reach out to their market automatically for over 15 years and we've distilled what works and exactly how to do it into these pages you're reading now.
3. Your instincts that email marketing is not the ideal tool for building deep, long term relationships with high value customers are correct. That's why you have salespeople. But, email marketing will put your brand in front of the vast numbers of potential customers out there that your sales team is not even attempting to contact now. They'll be engaged and compelled to reach out to you and start sales conversations so that your sales team can turn them into long time customers.
4. You're correct to wonder if your team will adopt a new approach. This is the biggest obstacle. That's why we've included an in depth section in this guide to help you build consensus with your entire team so that they all understand WHY this is so valuable and important to your business and WHAT their individual role in the new approach will be.

YOUR CUSTOMERS' NEEDS ARE ALL THAT MATTER

Our goal is to find as many customers as possible that have needs that our products and services can help them with. That way our customers' lives are improved, they value what they've purchased from us and hopefully continue to do so. Everyone wins!

So, we've got to clearly define what the challenges, obstacles and opportunities are that people and businesses face in their lives, that our solutions can assist with.

Identifying those problems, challenges, or needs is the foundation of this approach and will become the framework for communicating with your marketplace, engaging with customers and building deep, strong relationships with them that last for years.

You're going to build automated campaigns that engage hundreds or thousands of customers by highlighting these problems or challenges and then positioning your company as an expert in the field.

This will allow your sales team to spend their time talking with customers who have already been motivated to do something about a problem in their life or their business. Your sales team will then use questioning techniques around those same problems or needs to establish rapport and trust, strengthen the relationship and qualify opportunities. And, all of this information will drive further automated messaging campaigns that lead the customer through the buying process, and continue to strengthen the relationship, by focusing on what each specific customer cares about.

So, let's get to work!

Step 1: Gather Input & Prioritize

The reason most sales teams lack consistent process is that they can't get everyone on the same page, following the same process. New software will not fix that problem by itself. Of course, providing automation and making life easier can encourage the team to move in the right direction but, it's not enough by itself.

The #1 mistake the leaders make is conducting their search for solutions in isolation. Believe it or not, your team feels the same need for consistency and process that you do. Sure, they'll have different points of focus and varying priorities but, most often, the core needs are the same.

So, a crucial step is to engage the team in this process early. Learning new habits is not always easy and you'll need everyone to be enthusiastic about getting on board. Invite their opinions and make it clear their needs are a focus of the effort.

Remember, one of the primary challenges in automating your marketing and selling so you can grow faster is just finding the time to work on it while you're trying to take care of business at the same time. Why not enlist the team in helping so you can share the work?

The #1 mistake the leaders make is conducting their search for solutions in isolation.

SURVEY THE TEAM ABOUT THE NEED FOR CHANGE

Take a short and simple survey of the entire marketing and sales team, summarize the findings and discuss with the team. The survey results will serve as a call to action to focus on specific the most common obstacles and the greatest opportunities. Below are some suggested questions.

Tip: We've made this easy for you by embedding the survey and the results summary into the SalesNexus system. Start a Free Trial, add your team members to your trial system and you can send the survey to the with 3 clicks. The survey results will be summarized on your dashboard in SalesNexus!

Market Opportunity

1. Estimate the perceived size of the market
2. Estimate the % of the market you are able to reach/engage
3. Where would your time be best spent? (networking/researching, cold calling, presentations/meetings, proposals/negotiations/closing)
4. Where is most of their time currently being spent? (networking/researching, cold calling, presentations/meetings, proposals/negotiations/closing)

Current Process

1. How do they get engaged with new leads/prospect?
2. How do they determine the qualification/value of a prospect?
3. What questions do they ask?
4. Where is most of their time being spent?
    a. Researching/Networking to find potential leads/prospects?
    b. Cold approaches to leads/prospects?
    c. Initial presentations/discovery meetings with prospects?
    d. Managing, negotiating and closing qualified opportunities?
5. Current Sales Process: Once a qualified opportunity is identified, briefly summarize the high level steps that every client must go through leading to a purchase. (Examples: Demo, Price Proposal, Q&A/Negotiation, Closing; Discovery meeting, Quote, Closing;)

REVIEW SURVEY FINDINGS & GALVANIZE THE TEAM TO ACTION

It's crucial to share the findings with the team. Even if you're not sure you agree with the findings, it's best to convene a meeting, put the survey results on the table and just ask the team for their thoughts. Summarize the survey findings. What were the top answers to each question?

- Is there a large gap between the market size and the % you're reaching now?

  Yes? Lead generators, acquiring lists should be a priority.

- Is there a large gap between where time is being spent and where it should?

  Yes? Automation and Process should be a priority.

Here are some questions to ask to stimulate a good dialogue:

- What opportunities does this information indicate we should be working on?
- According to this information, what are the biggest roadblocks holding us back or slowing us down?
- What did you find most surprising about these results?
- What assumptions did you previously have that this survey has confirmed?
- What assumptions did you have that this survey has made you question?
- What disagreements or doubts do you have with the information summarized here? Should we do further research to confirm?

Ask the team to make a list of the top 3 to 5 objectives that they believe the survey indicates are the most impactful to your business. It may be difficult to bring everyone to consensus but, emphasize to the team that this is a journey, not a destination. The most important next step is to take action, address the most important or valuable areas and build on that success over time. It may be easier to ask everyone to create their own list of priorities and then ask everyone to vote on all of them and just pick the top few.

You objective here is to have the entire team reach a consensus on what's most important and which areas are going to acted on first. These priorities will guide you through the rest of the entire process. As you begin to build detailed processes and marketing collateral for every part of your business, it's easy to let the list of "must haves" mushroom out of control. Starting the process with a short list of priorities is essential to keeping things focused and moving forward.

Next, use the road map that follows to implement these priorities. As other ideas and opportunities come up, try not to get distracted and go down too many rabbit holes. Just keep a list of things you'd like to come back to. You have to get the basic platform in place first. Stay true to the priorities that you and the team have decided upon. This will be crucial when it's time to launch the platform and ask them all to make changes to how they're doing their jobs.

Step 2: Organize Customers & Enable Visibility

Whether the priorities you and the team decided on are all about new marketing and advertising in new markets or media in order to drive more leads into your existing sales process or more about optimizing and automating the sales process, the foundation that you have to build first is the same.

Every marketing and sales process is based on knowledge about the needs of the customer. The more you know about the customer, the more deeply you can connect with them in your marketing messages and one on one as a sales person.

Our goals is to build a database of customer information that can be easily sorted, filtered and analyzed based on those specifics about your customers that matter the most in your industry. This will drive your reporting of sales and marketing results and will be the basis of the messaging in your marketing.

The more you know about the customer, the more deeply you can connect with them in your marketing messages and one on one as a sales person.

IDENTIFY THE PROBLEMS YOU SOLVE FOR CUSTOMERS

Write them down below. Be as specific as you can. Here are some questions to ask yourself and your team to really get to the root of things:

- What's unique about a customer's needs that makes our company a better fit than the alternatives they typically consider?
- What happens to customers if they don't purchase from us or our competitors? What is the cost of doing nothing?
- What are the likely consequences of choosing to do business with one of our competitors, that could be avoided by choosing our company?

List your customers' challenges and opportunities here:

PROBLEM	% OF CURRENT CUSTOMERS	% OF OVERALL MARKET

(What is it that makes customers need a product/service like yours? This is not about why they chose you over the competition, it's about what made them start looking.)

Now that you've listed the problems:

- Rank them in terms of their value to your business. (which are the problems that your solution works best for?) Rank them based on both your current customer base and the overall market.
- Review this info with your marketing and sales teams and get their input.

IDENTIFY CRUCIAL CUSTOMER DATA TO TRACK

(Examples: Number of employees, revenue, current vendor, industry, etc.) Tip: every industry has it's little details that insiders know are the key to everything. What are those metrics about customers?

- List them below.
  - What do you train salespeople to ask customers now?
  - What do you ask your salespeople when they tell you about a lead or opportunity?
  - What do you need to know in order to quantify an opportunity?
  - What do you need to know in order to qualify the opportunity? (is this for real or not?)
- List your qualifying questions here:

QUESTION	TYPICAL ANSWERS

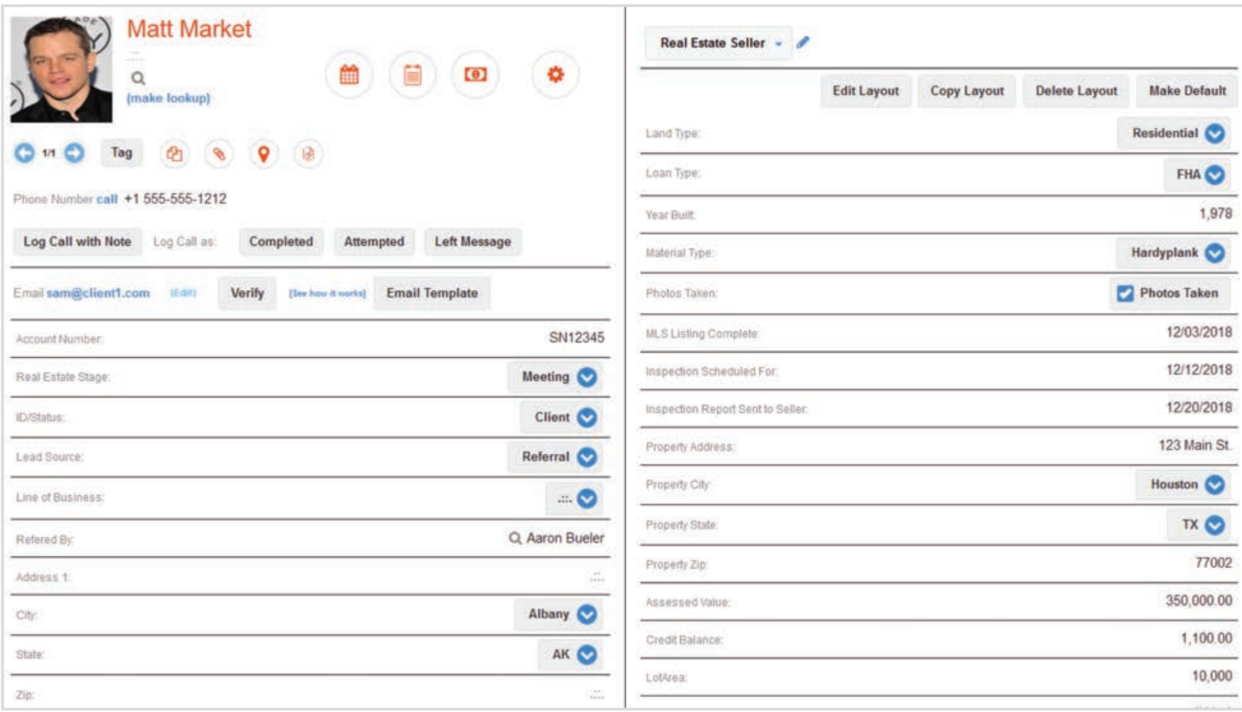
- Now that you've written the questions down, go back and list the most common answers beside each question.
- Review this info with your marketing and sales teams and get their input.

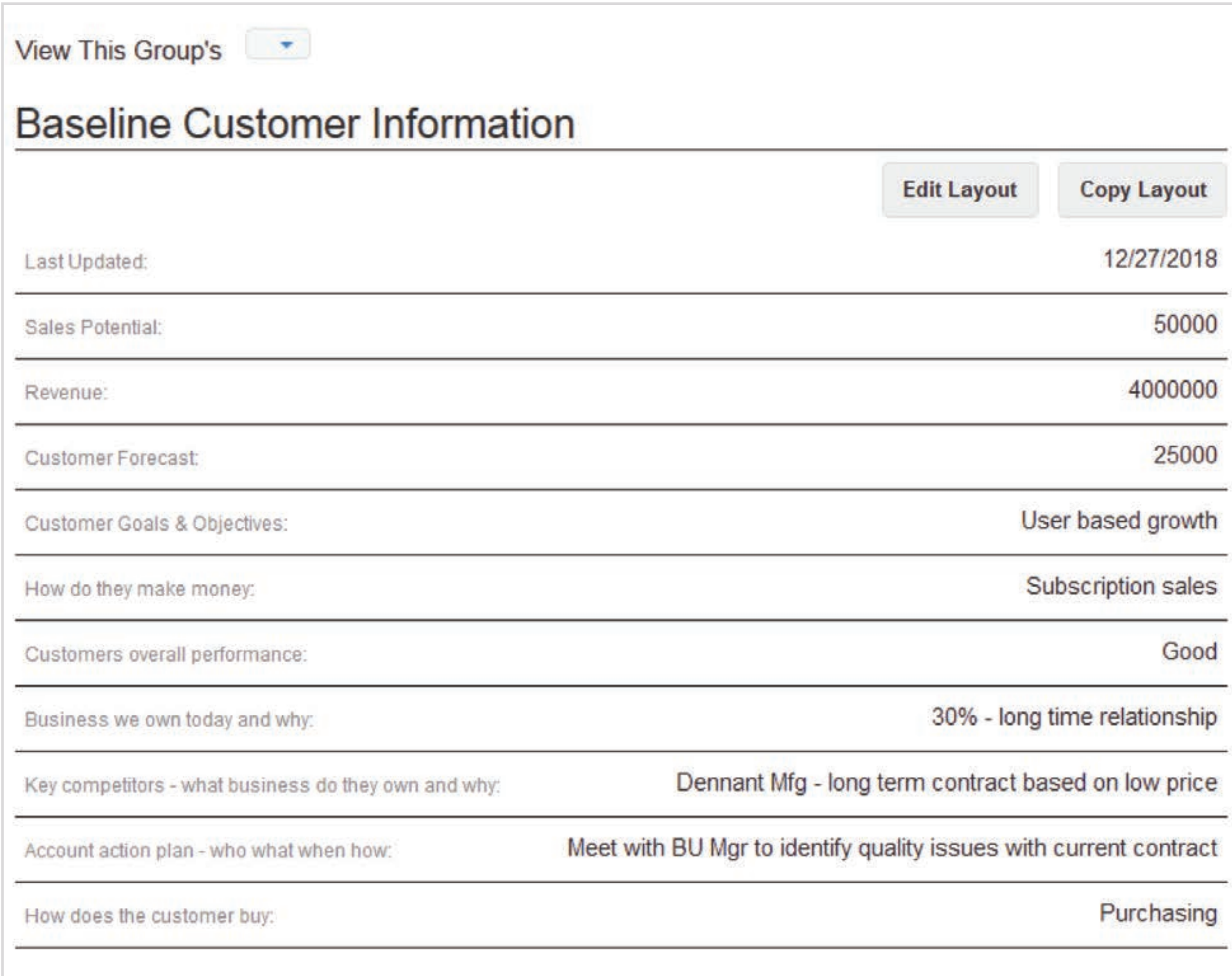
MAKE IT EASY FOR SALESPEOPLE TO ENTER AND RETRIEVE

- **Make it point and click**—dropdown lists, date pickers, checkboxes.
- **Avoid text boxes**—all of this information will be used to sort and build lists to send specific messages to customers that speak to their unique needs so, standardization is key.
- **Put it all in one place!** When you get a new lead, you typically have to enter basic contact info like their direct phone # or title, etc. Put these additional key customer details you've identified on the same page. If they're hidden on some other page, salespeople will forget to ask the questions and forget to input the answers.
- **Make some of them required!** Some of these questions are so essential in your business that if you don't have the answer, then it's questionable if the lead should even be in the system. Make those required. This will force the team to start filling them out regularly.
- **Keep it simple.** Salespeople will be turned off by screens with 20+ fields staring at them. In addition, it's unlikely you'll get customers to answer 20 or more questions in one sitting. Break things down into segments based upon when that information is relevant to your sales process. Arrange it on different screens or tabs or just sections of one screen. Just be sure that the essential information to know about ALL customers is front and center, right next to their phone # and email.

TRAIN YOUR TEAM TO ASK THESE QUESTIONS EARLY AND OFTEN

- Use the layout of the CRM as a script while on the phone with a customer. You should be able to at a glance recall the answers to these important questions that have already been answered AND immediately see which have not. Now you know what to ask in the next conversation!





View This Group's

Baseline Customer Information

Edit Layout | Copy Layout

Last Updated:	12/27/2018
Sales Potential:	50000
Revenue:	4000000
Customer Forecast:	25000
Customer Goals & Objectives:	User based growth
How do they make money:	Subscription sales
Customers overall performance:	Good
Business we own today and why:	30% - long time relationship
Key competitors - what business do they own and why:	Dennant Mfg - long term contract based on low price
Account action plan - who what when how:	Meet with BU Mgr to identify quality issues with current contract
How does the customer buy:	Purchasing

- Do some role playing. There's only one way to be sure the team is comfortable with asking these questions… Practice it with them. Pretend to be a customer and just have them go through the questions with you several times. Some of the team may struggle with it. Be patient with them and provide one on one coaching.
- Be sure to remind the team why this matters.
  - It will help them be sure they're asking the most important questions regularly.
  - It will help them use that information to deepen their relationships with their customers.
  - It will drive automation that will help you attract more qualified opportunities for them to sell to.

DON'T WAIVER!

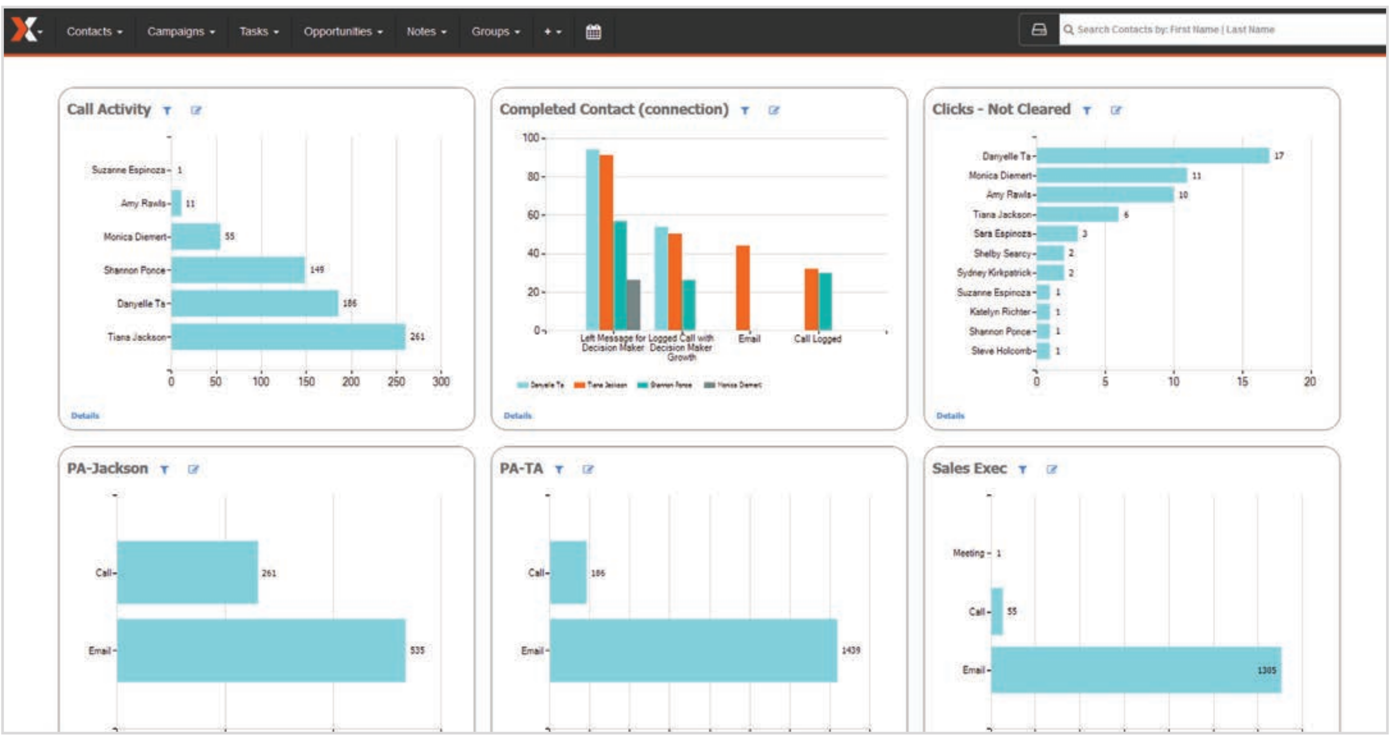
There is going to be push back from the sales team. They're going to fail to get these questions answered as often as you would like and they're going to tell you they just don't fit some of their customers or the CRM tool made it too difficult to enter the info, etc. Mostly, these are excuses. That's OK. They're human it takes time to build new habits. Don't scale back or change your plans because its slightly inconvenient at first. Here are a few measuring sticks to help you stay strong:

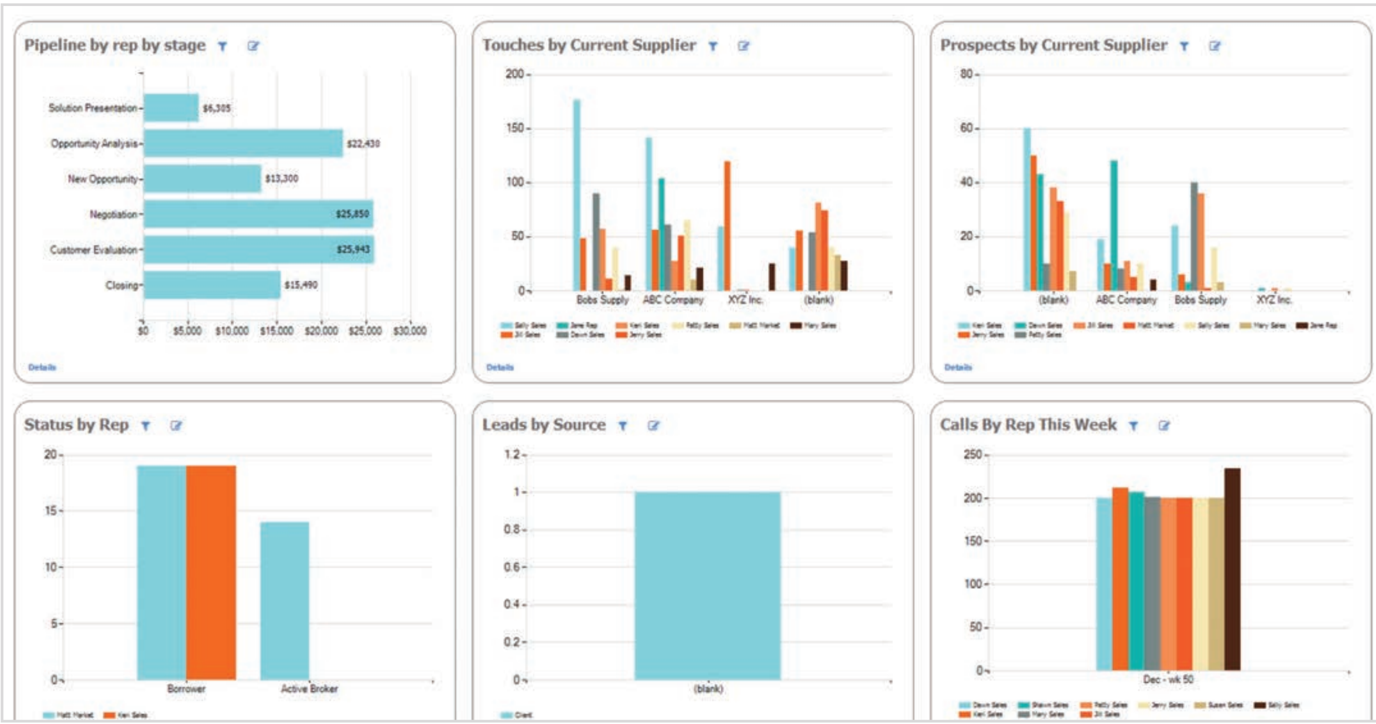
- Is the information essential to knowing what messages a customer should be receiving?
- Is the information essential to qualifying an opportunity?
- Are they struggling to get it because it doesn't apply to some customers or because it's just difficult for some customers to answer?
- Are some reps doing well with getting the info and others not? If everyone is having a lot of difficulty, then consider making some changes. DON'T change the game plan because of a couple of squeaky wheels.

MEASURE & MANAGE

Create reports/dashboards that show how your customer base breaks down based on all of these inputs.

- Graph completeness of all these fields in the CRM by salesperson. Coach the reps that aren't getting the data. Find opportunities to leverage data in other systems (accounting, operational, etc.) to help fill in this info for existing customers.
- Graph new leads added to the system based on the most important data points.
- Graph existing customers in the system based on the most important data points.
- Correlate sales volume with these data points.





Pipeline by rep by stage
Solution Presentation
Opportunity Analysis
New Opportunity
Negotiation
Customer Evaluation
Closing
$6,305
$22,430
$13,300
$25,850
$25,943
$15,490
$0
$5,000
$10,000
$15,000
$20,000
$25,000
$30,000
Details
Touches by Current Supplier
Bobs Supply
ABC Company
XYZ Inc.
(blank)
Details
Prospects by Current Supplier
(blank)
ABC Company
Bobs Supply
XYZ Inc.
Details
Status by Rep
Borrower
Active Broker
Leads by Source
(blank)
Calls By Rep This Week
Dec - wk 50

DASHBOARDS & REPORTS IN
salesnexus
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Step 3: CRM Customization & Training

LEAD WITH PROCESS, NOT TOOLS

Document the Current Process

Distill the input provided by the team about the Current Process into a single set of high level, can't be skipped, steps so that you can all be clear about where the bottlenecks are and what's going to change in the future.

Using the information from the survey, estimate the cumulative time being spent on each step.

- Can time be saved by automating/consolidating/standardizing any of these steps? (Examples: Have one team member do all the demos with the sales reps scheduling the appointments; Create an FAQ to send to new prospects; Create a script of questions to ask prospects;)
- Quantify the amount of time each change could save. Is it worth it?

Should the process be re-arranged?

Goal: Maximize the time highly paid salespeople are spending on closing deals.

- If a large % of time is spent qualifying prospects, performing discovery meetings, consider building your email list and using lead nurturing emails to pre-qualify prospects.
- If a large % of time is spent researching/networking/cold calling, finding good leads/prospects, consider building your email list and using lead nurturing emails to engage new potential prospects.
- If a large % of time is spent on proposals/pricing, consider standardizing pricing/proposals and use document sharing/mail merge tools to automate processes.

Document your New Process

Discuss the new process with the team and invite feedback. Let everyone put their ideas on the table and make sure that the most common scenarios are addressed. But, KEEP IT SIMPLE! Change is going to be difficult so, try to change as little as possible while addressing the priorities addressed in your survey of the team earlier. Avoid the temptation to create multiple screens of fields that salespeople must fill out. They're not going to do it.

In some businesses it does make sense to have places to manage technical or specific data like part #s, etc. But, for the purpose of your sales process, we're only concerned with those that will be captured from every potential customer.

Remember, if a field in your CRM is not filled out consistently, you won't be able to use it to segment your list and send marketing messages and direct campaigns.

If a field in your CRM is not filled out consistently, you won't be able to use it to segment your list and send marketing messages and direct campaigns.

Your new sales process must include:

A List of CRM fields that MUST be completed at the earliest possible time with EVERY CUSTOMER. You can add more fields but, the team needs to know which they are expected to fill out. Make those easy with drop downs, check boxes, etc. and put them all on the main customer screen so they're easy to find, update and use.

Specific rules for who will get your automated email drip campaign and when. For most businesses, the most valuable campaign to start with is on of these three:

1. **New potential leads**—leads you haven't ever talked to before. Start here if your team is spending too much time finding good prospects and you've developed a good plan to build up your list of potential customers.

2. **Cold/dead leads**—leads that you've talked to but, that didn't purchase. This is probably the easiest place to start for most teams. Most teams are already discarding 80% of the leads they talk to. Just staying in front of them with automated emails is a guaranteed winner.

3. **Existing clients**—current customers doing business with you now. Start here if you're in a very niche market and your focus is keeping the customers you have and upselling them with additional products and services.

Sales Process Documentation Tips

Quantify the time that will be saved. This will help keep your team focused on the right parts of the process and allow you to keep the scope of the project from creeping and getting too complex.

Quantify the additional leads/opportunities that will be created. Use these benchmarks:

- 10 to 20% of emails will be opened.
- 1 to 2% of emails will be clicked. Your team will call on the "clickers" so, your number of new leads = Emails sent per month x 2%.

Quantify the expected improvement in sales. What is your close rate currently? For most teams it's around 20%. So, your expected new sales = new leads (above) x Close Rate x Avg Sale Amount ($).

Ask the entire team, do these improvement make the change worthwhile? Be as clear as possible about the expectations:

1. All leads will be entered into and kept up to date in the CRM.
2. These essential fields will ALWAYS be updated.
3. This campaign will ALWAYS be activated in the appropriate scenarios. (Of course, in many cases, this piece can be automated if the CRM is kept up to date.)

Finalize and document the final process. A flow diagram is nice but, really, this doesn't have to be too complicated. Just give the members of your team in various "roles" a user guide for doing their job. When this happens, do that....

Here's an example of the customized user documentation we create for new SalesNexus clients.

Role Based Training for the Entire Team

Don't short cut this step. Here are the essential elements of a good training/rollout process:

1. **Team meeting reviewing the findings above and the expected benefits of the new process.** Everyone needs to be on the same page and understand why this is important to the business as a whole. Certain team members may feel like their world is being turned upside down to little benefit for them personally. Recognize that. Let them voice their concerns and make sure the entire team hears leadership say "We understand. And we're doing this anyway. Here's why...." Keep everyone focused on what the changes will do for the business.

2. **Document the specific tasks that each team member will need to perform consistently in order for the process to work.**

3. **Create role based guides that provide steps to follow in the context of real world scenarios.** (Example: When a lead calls in, what does the receptionist do? What does the salesperson do? How does marketing find out about the lead and put them on the nurturing campaign?) Be sure expectations are clearly documented for everyone in the following roles:
   - Marketing Management
   - Marketing Assistant
   - Inside Sales
   - Outside Sales

   - Sales Management
   - Customer Service Management
   - Customer Service Rep

4. **Set aside time to bring together each group of team members in a specific role and walk through their role in the process.**
   - Start with Why?
   - What did you find in the surveys?
   - What was wrong with the old process?
   - What do you expect to be the result of the new process?
   - Leave no doubt. Is adopting and adhering to the new process an option?
   - Create reference resources for each role including screenshots, videos and contingencies. Record the training sessions and keep the video easily accessible for reference. Here's an example of a SalesNexus led team rollout training session.

5. **Measure the process.** Create dashboards and reports that measure adherence to the process. Initially, it may be more important to have graphs of who's logging on and who's adding contacts or filling out certain fields than it is to measure how many proposals are sent out.

6. **Give the team feedback.** Create dashboards for each roll so that they can measure their own performance and compare themselves to others on the team. Coach those that don't seem to be getting on board early and often. This is how the team will know you're serious about this. Reward those that are leading the charge.

7. **Review and Revise.** Some of your assumptions about how things will work will undoubtedly be off the mark. Get back together as a team and review the process and talk about what's working and what isn't. Often, a small change to the way a drop down list is organized or where a field is placed can make all the different.

Step 4: Marketing & Sales Automation

BUILD YOUR LIST OF POTENTIAL CUSTOMERS

This can be the toughest part for many teams. Especially those that have been primarily focused on driving growth through good old fashioned outbound selling efforts. You know the old saying "When you're a hammer, everything looks like a nail."? That tends to happen to business owners and sales managers too. Remember, our goal here is to maximize the growth of your business. We're looking for ways to break through the old economics of your business:

"If I put a salesperson in a new territory, it will take them 3 months to get trained and fill their pipeline, sales will start to happen within 6 months and we'll reach profitability for that market within a year."

That's one way to do it but, it's a lot of work. It may seem low risk and affordable compared to expensive advertising campaigns, etc. but, it's just too slow. It's a lot of work to hire, train and manage new sales people in new markets! You're risking a lot of time and effort. And in the meantime, there's an ever growing risk that one of your competitors will find a more efficient way to grow and grab market share in territories you haven't gotten to yet.

"If I put a salesperson in a new territory, it will take them 3 months to get trained and fill their pipeline, sales will start to happen within 6 months and we'll reach profitability for that market within a year."

So, we have to think big. Don't be too conservative and base your thinking on the old ways of doing things. Imagine that you're starting a new business and you have all the money in the world. What would be the fastest way to engage with every possible customer in the world?

Of course, I'm not suggesting that you go hire a New York City ad firm and run Super Bowl ads. For many businesses, that's just a waste of lots of money. The point here is that your goal should always be to build direct lines of communication with each and every potential customer in your universe. This ability to communicate with more customers becomes a long term strategic asset for your business and the lever that drives rapid growth.

In some businesses, you can join the National Association of Whatever and purchase a copy of their membership list and that's pretty much it. Now you can snail mail, call or email all of your potential customers to your heart's content.

In other businesses, you have to be a bit more creative. Of course, there are very effective and affordable means of digital advertising now that let you target very specific demographics. While I highly recommend experimenting with these opportunities, that's beyond the scope of this roadmap. My only advice is to start small ad campaigns, measure the results, adjust and then scale up what works.

If we offer helpful information to customers based on what we do know about them, without asking for their business until they show us they're ready, then they'll learn to see our brand as a trusted resource of expertise in our field.

No matter what means of advertising makes the most sense for your business, for businesses that rely on human to human selling to close the deal, every ad or marketing campaign leads to a human being engaging with your business. As we've discussed in previous steps, learning everything you can about each person you have contact with and capturing that knowledge in an organized, searchable way is crucial.

Our objective is to help you start building your list of potential customers more quickly and to help you turn that list into rapidly growing sales.

So, whatever your advertising budget, you need a way to engage with potential customers before they're actually ready to purchase. If we treat every name on a list as someone ready to buy now, we'll turn most of them off and the value of our list will deteriorate rapidly over time. But, if we offer helpful information to customers based on what we do know about them, without asking for their business until they show us they're ready, then they'll learn to see our brand as a trusted resource of expertise in our field and when they ARE ready for a solution, they'll think of us.

Acquire Industry Lists

No matter the industry, your list of potential customers is golden and building it up quickly is essential. Spending money on acquiring lists is usually far more affordable than ad campaigns that have the potential to reach the same audience.

Tip: Getting the email address is essential in building your list. When purchasing lists, spend the extra $ to get the emails. Your only other option for contact is cold calling or direct mail. Both of those will be far more expensive and far slower.

- **Trade associations**—industry trade associations are usually the most high quality in terms of accuracy. They also tend to be a bit more expensive but, it's probably worth it. If a trade association doesn't directly apply to your business or your customers, think of trade associations that will have significant overlap. (Example: if you target engineers in refineries but there is no "association of refinery engineers", think about refinery related certifications or training that those engineers typically have: "Certified Ingersoll Rand Valve Engineer", etc.)
- **List brokers**—there are a lot of them out there and frankly, a lot of them should not be trusted. However, there are some reputable firms out there that will learn about your specific target market and build a list to your specifications. Prices range from almost nothing to crazy expensive but, generally, you get what you pay for. Key elements of a successful list purchase are: 1) Make sure you'll get a credit for any contacts that turn out to be invalid (the email bounces). 2) Make sure you get a copy of the actual list. Some vendors "rent" you the list, meaning they send an email to their list for you. This seems to make life easier but, it's a one time thing and you can't be sure they do a good job of it. 3) Make sure you get to review

the list before accepting it/paying for it—they can send you the companies and titles, etc. without including the phone #s and emails. 4) Start small—get a small list (2000—5000) and do 2 or 3 test emails to that list. Use those results to decide if you want to purchase more from that vendor.

- **Your sales team**—by far the most under-utilized means of building a list. It's right there in front of you every day but, you're just not taking advantage of it. All day, everyday, salespeople email customers and those emails aren't going into your list. Get your salespeople to download all their emails from their phones and computers to start your list and then make sure new ones get added too. The best way to make sure this happens is with your CRM. "If it's not in the CRM, it didn't happen." is a good phrase to repeat often. This way the salespeople get used to the idea of putting things in the CRM every time, immediately.

Create Valuable Content and Collect Email Addresses

You've heard people talking about "content marketing" for years now. And it can seem difficult. You may not be the type of person to sit down and write a "whitepaper" or create a video. That may be true but, you need to have something on your website that allows people to learn from you. This let's them learn to trust you as an expert AND it gives them a reason to give you their email address! Everyday, lots of people visit your site that you never get to talk to. Let's start a conversation with them!

A good PDF, video or even a short blog post is an essential part of any email campaign. The good news is that it doesn't have be difficult or time consuming to create. In fact, you probably already have the pieces in your hands, you just have to put it together.

Tools/methods to diagnose if you have one of the problems/challenges

- Industry benchmark study on typical costs, failure rates: "EPA says poor insulation costs homeowners $3,000 per year!"
- Safety Tips: "3 Ways to Avoid Assembly Line Injuries"
- Tips on how to know if you have a problem: "4 Signs Your Conveyor System is Too Old"

Tips and tricks to address the problems/challenges

- 3 Ways to Stop Wasting Money on....
- Sure Fire Tricks to Cut Costs on....

Case Studies

- How XYZ Company Fixed....
- "Acme Co. Turns Out of Date Building Into State of the Art Fabrication Wonder"

Tip: Use what you have at hand to get the process started and work on creating more content once you have a system in place to leverage it. You probably already have documents, video and other content created as sales tools or training tools that will be a great first start. I.e. A simple comparison chart comparing you to other options.

Tip: Use 3rd party content. Your website and your emails can point to industry articles, video of news reports, etc. You may not even need to create the content yourself at all!

Here's a video we created as a quick guide to creating your content and your emails.

Tip: Create videos. Videos get 2x the response that a PDF or article gets. People just prefer to watch videos. And the bar is not as high as you probably have it set in your mind. What works is straight ahead video of an expert in the field sharing valuable knowledge. See the video above as an example. It took us 2 hours to write the script and shoot the video.

AUTOMATICALLY ENGAGE YOUR ENTIRE MARKET

Create an Automated Email Drip Campaign

Every contact on your list should get an automated, on-going, email campaign. The goal of this campaign is NOT to replace the salesperson. It is not to “sell” the customer. That’s the salesperson’s job. The goal of the email is to establish your company as a trusted expert in the field that can serve as a resource for helpful information to your target customer.

Not everyone is going to want to buy right away. We want to be the brand they call when they ARE ready to buy.

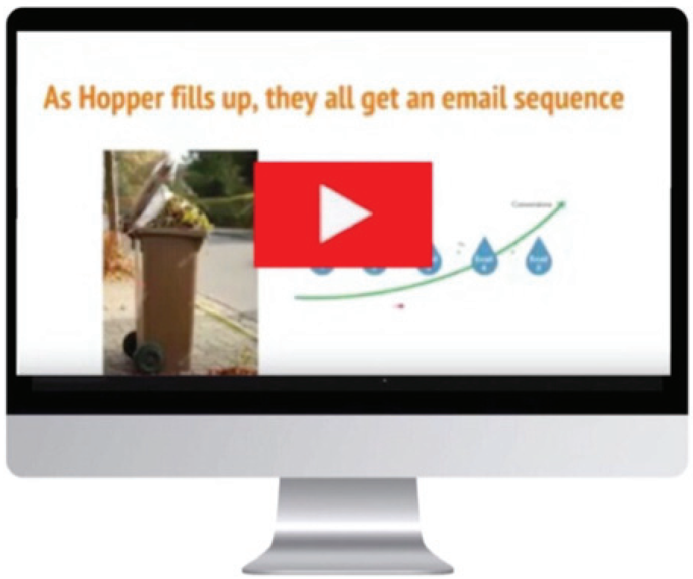
Each email should...

- Talk about one for each problems identified in Step 2 above.
- Talk about what could change/improve if the problem were addressed.
- Offer information to address the problem. (Offer the information, don’t provide it in the email. Make the email as brief as possible and let those interested click a button or link to get the PDF or what the video, etc.

  The Template:

  – Subject = Do you have this problem? Is this problem killing you/profits/safety?
  – Headline = Is you business/career/profits/team getting killed by this problem?
  – Body Text = High costs/Equipment Breakdowns/Safety Incidents typical cause this problem/result. If you’re experiencing this result, you’ll want to take a look at this!
  – Call to Action = Click Here to Watch/Download/Read “title of your content”

- Post Sell = Don't keep letting safety incidents/equipment breakdowns/etc. Sink your business. Check out "title of content" now!
- Subtle pitch = We hope you find this helpful! If <your company> can help you cut costs/ stop safety incident/etc., give us a call here.



THIS IS THE PROBLEM YOU IDENTIFIED IN STEP 2 ABOVE.

Mila,

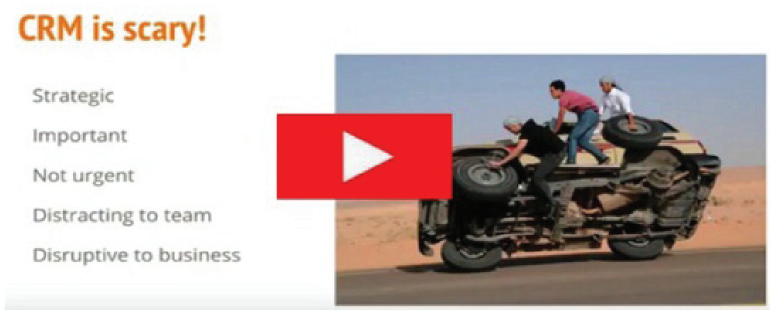
Are you struggling to scale up sales without huge investments in marketing or hiring new sales people?

How would a 20% increase in 6 months work for you?

See how you can grow without busting the budget in this short video:

See How in 4 Minutes!

Are you afraid to change your CRM?



THIS IS THE PROBLEM YOU IDENTIFIED IN STEP 2 ABOVE.

Mila,

Is your CRM measuring and managing your sales process? Are your sales people using it consistently?

If not, you're probably not doing anything about it... For good reason!

How do you change CRMs while still continuing to DO business?

See how here!

Create an Offer / Call to Action Email

- Talk about a problem: "Are you tired of <this problem> driving up maintenance costs?"
- Describe a product your offer that solves this problem: "The Invincerator 2000 has eliminated maintenance downtime in thousands of assembly plants".
- Describe how things will improve once the problem is addressed: "Stop struggling to meet production goals. Relax and enjoy a smooth, continuously running assembly line."
- Call the customer to action leading to a sale: "Schedule a Demo Today"

GENERATE AND COLLECT REFERRALS

Create a process that ensures you'll ask for referrals from existing customers. This could be a simple series of phone calls to recent clients or it could be a combination of email, social, direct mail and phone calls.

Referral Process Example

STEP 1	Call recent new customer—"How are things going? Are you happy? Would you recommend us to to your friends?"
STEP 2	Email—take our survey.
STEP 3	Mail—swag and a letter about how valuable a referral is and how to give you one.
STEP 4	Call—ask for the referral again or say thanks for the referral they gave you.

Shop for tools, services, lists, consultants, etc.

If you already have CRM and marketing automation tools in place, there's a good chance that you can accomplish most of what's described in this guide with the tools you have. Typically the issue is how difficult it is to get things just the way you need them and limitations that create additional steps for the sales team. Here are some tips for shopping for new solutions:

1. Use YOUR process as the feature list to compare to any tools you consider.
2. Resist changing your process to fit the tools you like or have worked with before.
3. Compare Solutions here.

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WHY SALESNEXUS?

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