

7 STEPS TO A COMPLETE

# Small Business Sales & Marketing Plan

by Jay Pinkert



**C**hloe Emerson owns a small but popular coffee shop called Mug Shots in Portland, Oregon. Like many small business owners, her hopes and dreams are a mix of business goals and personal aspirations: open a second location, organize her contacts, start a newsletter, eat pastries in Paris, sing at her open mic night.

You likely have a lot in common with Chloe. You may not want to sing at open mic night, but you do have goals and aspirations for yourself and your business. But if you're not seeing the business growth you'd hoped for, your dreams may start to feel out of reach. You have a great product or service, but like Chloe, you may struggle with how to effectively manage your marketing and find the most efficient, cost-effective way to attract, keep and grow your customer base. Maybe you've even started to doubt your ability to run a successful business.

It's a common challenge for many small business owners; they invest time and money on advertising to attract interest, but don't have an overall marketing strategy in place for converting leads and retaining customers. Leads coming in to the website aren't effectively captured. Warm and cool leads that may buy later are forgotten. And opportunities for repeat sales are missed.

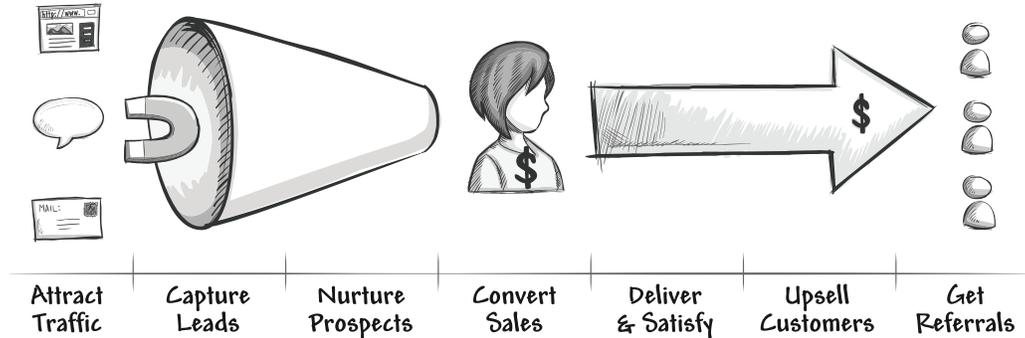
With seemingly unlimited ideas and strategies out there, it can be difficult to distill them all down into one seamless marketing plan that will work for your business. In truth, the solution to your marketing woes is as simple as developing a clear approach based on lead and customer behaviors. Just as a business plan is essential for outlining the nature and scope of your business, a well-thought-out marketing plan will set the foundation for how you attract, capture and keep happy customers.

You may be tempted to just hope for the best with your current setup. But taking the easy road will lead to missed opportunities, wasted time and lost revenue. A good marketing plan takes time and effort to develop and implement—yet the rewards can be exponential.

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## Meet Lifecycle Marketing

Lifecycle Marketing provides guidance to small businesses searching for a simpler way to develop a marketing plan. No expensive books and workshops. No complicated forms and exercises. No gimmicky sales jargon. Just seven simple steps that act as a framework for developing your sales and marketing process, based on Infusionsoft experts' experience helping thousands of small businesses grow.



Using Lifecycle Marketing, you can create a marketing plan designed to measurably grow your business through targeted communication and smarter lead management, leading to better lead conversion rates, increased sales and greater profits.

Now that you understand the importance of developing a clear, structured marketing plan, let's dig a little deeper into each of the steps.

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## STEP 1: Attract Traffic

Consumers today have become highly adept at ignoring advertising in all its forms—they skip TV commercials, stream free online radio, block emails from unknown senders and are virtually blind to banner ads. Paid advertising alone is no longer a viable option for driving traffic to your website; you have to *earn* traffic by creating valuable content that attracts visitors.

Content can mean many things to many people, but really it's any valuable piece of information or entertainment that attracts leads to your site.

Some content is naturally prone to lead generation purposes, such as reports and webinars. For example, if you sell interior design software, you could write a report called *"10 Tricks for Better Space Planning."*

In both cases, you'll attract traffic to your website with the lure of valuable information. More importantly, you'll start to develop a trusted relationship with your visitors. When creating a content library, it's best to create one piece at a time. Before you know it, you'll have built a body of work that raises your brand equity and serves to generate leads and raving fans.

Once you have content in place, you want people to find it. Here are a few ideas to get you started.



### Get Discovered with SEO

SEO (search engine optimization) is the process of getting your content and website found when people perform searches on sites such as Google or Yahoo. Better search engine rankings mean you get seen by more people—and that increases traffic to your website.

## Get Results with PPC

Paid advertising, or Pay-Per-Click (PPC), enables you to boost online traffic by paying a fixed amount to promote link clicks to your content and website. The best ways to get started in paid advertising are through Google AdWords and Facebook Ads.

**Google AdWords**—Google is the simplest and most well-known platform for PPC advertising. Basically, you bid on keywords that are most relevant to your business, and then pay Google a certain amount for each time someone clicks on your ad. The more popular the keyword, the higher the per-click price.

**Facebook Ads**—Facebook is second only to Google in terms of site visitors per day. Where Google allows you to target based on what people are searching for, Facebook allows you to select what type of people your ad will be served to—say, yoga enthusiasts or moms in a certain ZIP code.

## Get Social

Social media doesn't have to be daunting. And since 75% of consumers use social media in some format to learn about products and services, you can't afford to not be in the social sphere. Start a blog to talk about new products, industry news or company updates. Reward Twitter followers or customers who "Like" you on Facebook with exclusive offers and specials. And maintain your B2B connections on LinkedIn. All of these services are free and easy to manage with only a little effort. The keys to successful social engagement are being consistent and being real.

what content can I use to attract traffic?

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where should I promote my content?

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## STEP 2: Capture Leads

Now that you're attracting people to your website with the lure of valuable content, you need to entice them to give you their contact information so you can nurture them over time. Web forms are an excellent way to capture leads, but the reality for most small businesses is that the majority of their website visitors never submit a form. If this is the case for your site, there could be several factors dissuading people from opting in.

### Your Content Isn't Compelling

For visitors to fill out a Web form, they must be motivated enough to share their personal information and take the time to consume the content. If your opt-in rates are low, it could be because your content doesn't seem to offer enough value.

The best content is informative and original. Content that is fluffy or simply rehashed from somewhere else will not perform well. Many businesses have a newsletter sign-up form, but this is becoming less effective as people look for ways to reduce the number of emails they receive in an already overloaded inbox. If you do offer a newsletter, be clear about the benefits of subscribing.

Make sure the way you describe your content motivates visitors to act. To do this, use a strong headline that entices them to action, clearly state the benefits of the content and help them feel rewarded for taking action.

### You Ask for Too Much Information

Consumers are becoming more protective of their time and personal information. To maximize opt-ins, minimize the number of required fields on your forms. Typically, name and email are sufficient. If you sell to other businesses, you may also want to capture company name. A good rule of thumb is that the more information you ask for, the more value you need to provide. You can always ask for more data as your relationship grows.

### You Don't Inspire Trust

If a visitor is reluctant to submit a form on your website, it could be because your site doesn't look credible enough. When a prospect visits your website, they should sense that you offer a comfortable level of expertise. Anything less means that they will continue to shop around until they find someone who inspires confidence. Demonstrating expertise can be as simple as including customer testimonials or case studies, mentioning industry awards, listing credentials and certifications and linking to your privacy policy.



Clearly state the benefits of submitting the form.

## STEP 3: Nurture Prospects

The truth is, most buyers don't see an ad and immediately purchase your product. They buy when they are ready to buy. To reach these buyers, you need a systematic approach for developing trust and converting leads. The not-so-secret weakness of small businesses is that they don't follow up with leads as well as they should. But consistent, valuable follow-up messages can prove to be a huge competitive edge, as long as you approach the nurturing process with a clear communications plan in mind.

### Set Frequency Expectations

Customers who opt in to your communications want to hear from you, but they don't want to be overwhelmed by hyper-frequent communications. Create a consistent timeline for your campaign that fulfills the needs and wishes of your customers as well as your business. It's best to set your customers' expectations upfront—for example, "Sign up for our monthly newsletter" or "Get our weekly specials." If you have an online storefront, for example, you may want to send weekly emails with new products or a limited-time sale. If you're a motivational speaker, a monthly newsletter might be a better approach. Daily emails are almost never a good idea unless your subscriber is expecting it.

### Personalize Your Communications

Studies show that customers respond better to communications that are personalized to them. Evaluate your follow-up communications—whether email, direct mail or other methods—and determine how you can customize them to each person in your database. It could be as simple as using their first name or as targeted as suggesting products based on past purchases.



Personalized email campaigns generate two to three times higher click-through rates than mass email campaigns and two times higher conversion rates.

Source: Aberdeen Group, December 2009

## Upgrade from Autoresponders to True Automation

How many times have you purchased something online and received a generic follow-up email that was supposed to seem personalized but was clearly automated? Did that email deepen your relationship with the company or simply annoy you?

Many busy small businesses send immediate follow-up messages through autoresponders because they think it makes customers feel appreciated. But due to the limitations of typical autoresponders, which only allow for basic personalization and can't adapt to customer behaviors, today's savvy consumers perceive these "personalized" messages to be a waste of time.

To really build relationships with customers, your automated follow-up has to be truly personalized and targeted based on customer behaviors, such as past purchases or interests. Amazon does this all the time, and so can you. Imagine the difference between the generic message in the previous paragraph and a follow-up message like this: *"Hi, Sara. Thanks for buying a blue smart phone. Here are a few cool things you should know to get the most from your phone. By the way, we also have blue accessories to go with your phone. As a new customer, you can save 15% on accessories, this week only."*

My nurture sequence:



Day 1  
Newsletter



Day 15  
Coupon



Day 30  
Newsletter

## STEP 4: Convert Sales

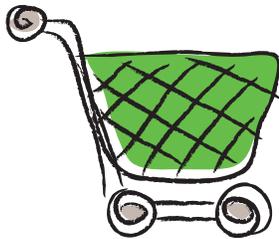
You can attract, capture and nurture all the leads you'd like, but if they don't convert into paying customers, you're not going to make any money. Depending on your business type and setup, you likely use one of two methods for converting leads into customers: an online shopping cart or a sales team. No matter which method you use, there are a few strategies to realize the full potential of both.

### E-Commerce Shopping Carts

Your online shopping cart represents your digital storefront and should be as effective and easy to use as someone visiting a brick-and-mortar store. However, there are some advantages of selling online that can't be realized in a typical retail environment.

First, an online shopping cart gives you the ability to intelligently upsell customers to increase transaction amounts. Upsell offers are most effective when they are closely related to the current order. A good cart will present an upsell offer in a clean, sensible fashion that allows customers to easily add additional products to their purchase. Some shopping cart systems will even allow you to offer multiple upsell offers.

The second advantage of selling online is that you can use targeted campaigns to invite people back to your store if they leave before making a purchase. The most effective campaigns generally offer a discount on the products the customer was viewing.



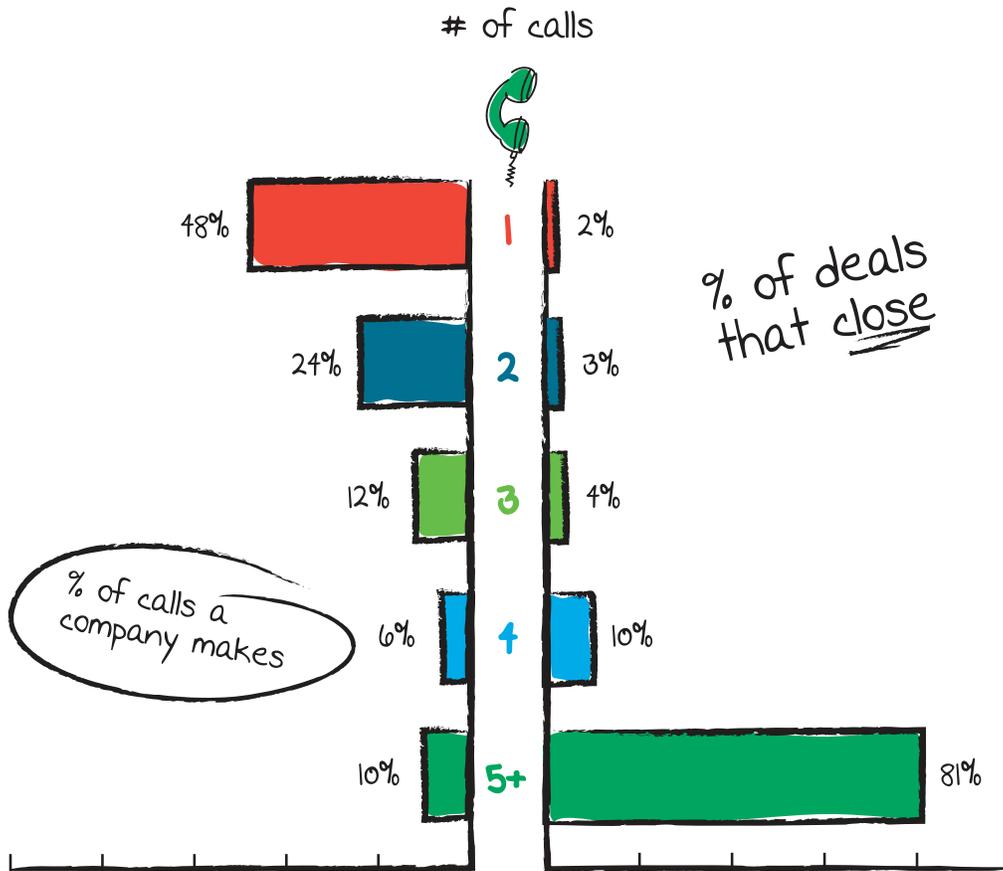
Use upsell and cross-sell offers to increase transaction amounts.

### Personal Selling

For some companies, customers must connect with a salesperson before making a purchase. Unfortunately, many of these sales-intensive businesses lose revenue because of a buy-or-die mentality on the sales floor. If a lead comes in that isn't ready to engage right away, it can fall into a black hole of lost leads that could have become customers given enough time and nurturing. These wasted opportunities add up to a lot of lost revenue in the long run.

To prevent this, you must be able to nurture leads and identify when they are ready to distribute to your salesperson. Your sales team is a valuable resource, the driving force behind growing your business. They can be much more effective if your CRM automatically evaluates certain behaviors and factors, identifies hot leads and intelligently distributes them based on specific factors such as industry and geography.

In addition, every day your sales team engages in dozens of communications with leads. Automating some of these communications could free up your team to focus on only high-impact conversations instead of routine follow-up messages. This type of workflow automation can be used to automatically add notes to records, send thank you notes after sales calls, kick off educational emails and more. The best part is, by leveraging workflow automation to save time, your sales team starts to view your CRM system as a valuable resource—and not just a waste of time.



It takes an average of five sales calls to close a deal, but most salespeople give up after just one or two calls.

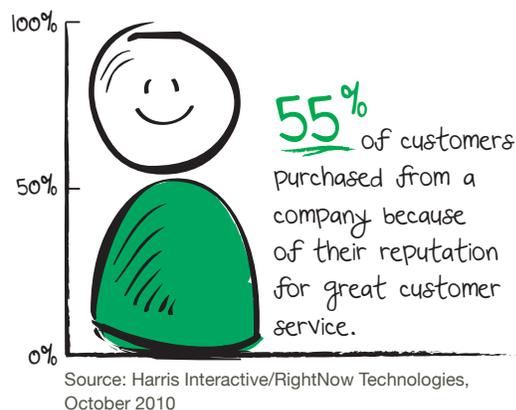
## STEP 5: Deliver and Satisfy

If you have ever received disappointing customer service (and who hasn't?), you won't be surprised to learn that most companies spend more on acquiring new customers than keeping existing ones happy.

Winning lifelong customers requires the ability to not only get a prospect to buy again and again, but to do so happily. The benefits go far beyond inspiring loyalty and repeat business; happy customers become advocates for your brand, driving referrals by sharing their experiences with friends, colleagues and social networks.

### Service as a Marketing Strategy

Great customer service is a HUGE competitive advantage. Say you need something fixed at your office. Company A was an hour late, talked on their cell phone the whole time and left without telling you they were done. Company B, on the other hand, arrived on time, explained what they were going to do to fix your problem and gave you a coupon for your next service. Which company will you use next time?



The same warm, friendly, accommodating approach you take to nurture a customer should be continued for the duration of the relationship. Positive experiences lead to repeat business and referrals. Service as a strategy has to come from the top and be truly ingrained in your company's core values. Every process, every decision, every employee must act in alignment with this strategy in order to be successful.

### Deliver as Promised—Automatically

Despite their best intentions, many small businesses over-promise and under-deliver simply because they don't have enough time and energy to meet the expectations set during the sales and marketing process. Luckily, many elements of great customer service can be automated, which eases the burden on the business and helps customers feel valued and appreciated.

For example, a big customer service challenge for many businesses is training customers on how to successfully use their product. Instead of training customers in person or over the phone, which requires a big commitment from both parties, automation allows you to create engagement campaigns that slowly drip information over time.

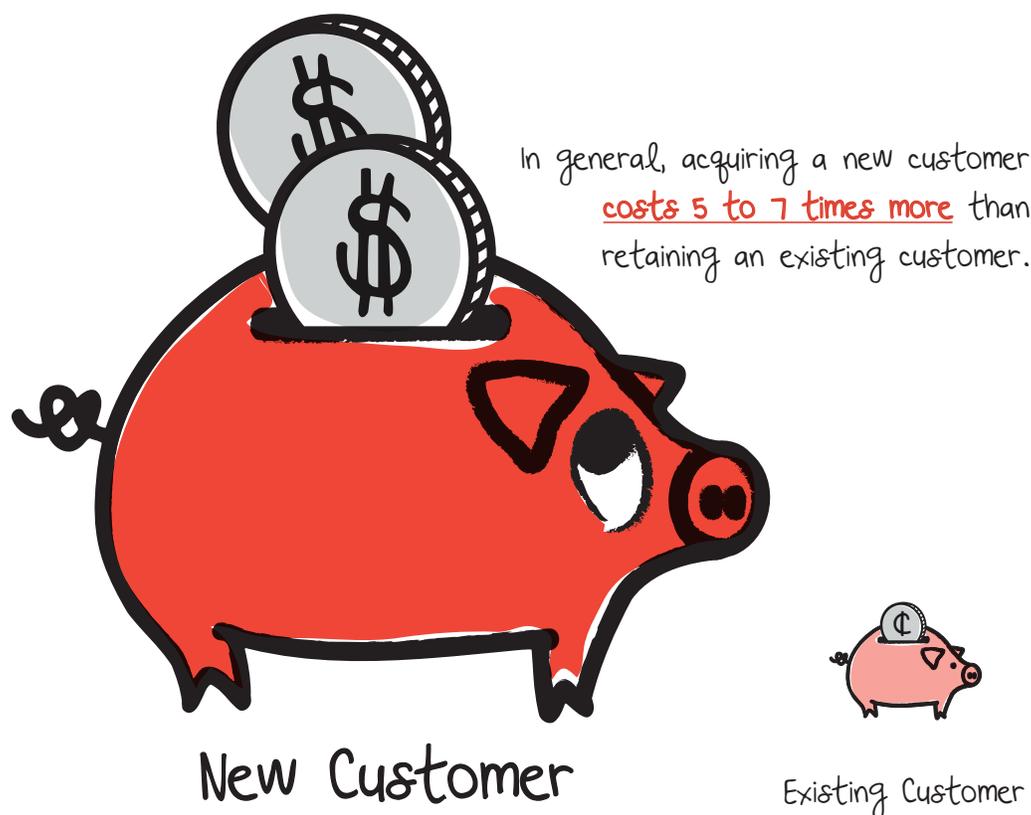
Another advantage of automation is that it allows you to easily identify and segment happy and unhappy customers through a simple survey. Customers who are satisfied can be automatically rerouted to a testimonial and referral campaign while unsatisfied customers can be routed to customer service for personal follow-up.

## STEP 6: Upsell Customers

One of the very first statistics business owners learn is this: **80% of your profits come from the top 20% of your customers.** Yet so many small business owners spend all their time focusing on attracting and converting new leads and customers that upsell and cross-sell efforts directed at existing customers completely fall off the radar.

As we've shared in the previous steps of Lifecycle Marketing, consistent communication with customers is essential—and this shouldn't end once a first sale is made. Customers who had a positive experience with your company are more likely to think of you the next time they need a similar product or service. Continue to develop relationships through lead nurturing, like letting customers know about complementary products and services they might enjoy.

The best way to accomplish this is to create automated follow-up campaigns based on a scheduled sequence that continues to communicate with customers in the form of emails or direct mail and other offline methods. You could even target these communications to feature new products, services or promotions based on your customers' previous buying history, ensuring you're always delivering something of value.



## STEP 7: Get Referrals

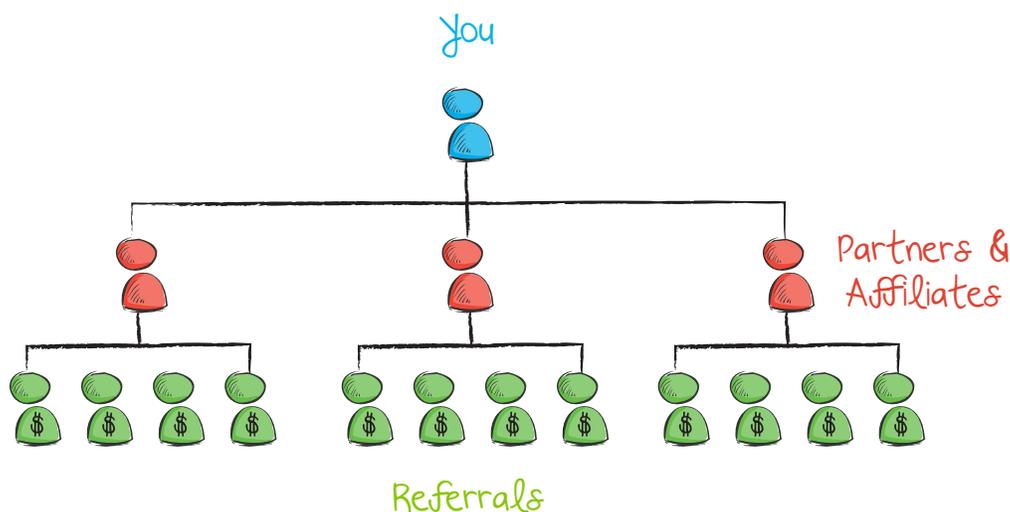
Once you've established a clear process for funneling leads from their first contact to after-purchase communications, you're in a great position for the final step in Lifecycle Marketing: growing even more through customer referrals and affiliates.

### Get Customer Referrals

People are more likely to do business with someone when they're introduced by a mutual acquaintance. Based on that idea, customer referral programs are a fantastic way to generate highly qualified leads. The key to getting referrals from happy customers is simple—just ask. And don't forget to reward customers for their referrals with a thank you gift, account credit or heartfelt thank you card.

### Leverage Affiliates

Affiliates are third parties who market your product on their website and through email and social media. They are an excellent way to drive traffic to your website and generate leads. The best thing about affiliate programs is the ROI—you pay only for performance. You simply make a small investment in marketing resources and then pay affiliates for any leads or sales they generate. Because your investment is minimal, these programs can yield amazing returns.



### Motivate Partners to Act

When developing referral and affiliate programs, it's important to clearly outline what you hope to achieve and provide the right incentives to encourage participation. A partner's reason for participating is not always all about money. Take time to understand those motivations and develop incentives that best suit those needs—and your own. Think back to Step 5: Deliver and Satisfy. The same principles we outlined for making customers happy should be applied to your partners—always deliver as promised.

## Achieve Your Goals

Small business owners dream of striking the perfect balance between running a successful business and spending time doing the things they love. The steps in Lifecycle Marketing are designed specifically to help small business owners realize this dream. Implementing a marketing plan based on this platform will help you rediscover the joy of running your own business AND give you more time to tackle other important items on your life's to-do list. Launch a new product. Start an online store. Coach a full season of Little League. Whatever you hope to accomplish, it will be well within your reach.

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# Marketing Automation Solutions from Infusionsoft

To successfully implement the Perfect Customer Lifecycle, you need to have the right tools and resources in place to fully realize the potential of this powerful foundation. And that's where Infusionsoft comes in.

Infusionsoft is the industry leader in all-in-one marketing automation software that helps small businesses grow through better customer engagement.

With Infusionsoft, small businesses have access to powerful, scalable solutions that bring all of their marketing and CRM services into one integrated system, enabling them to reach customers more effectively and increase profitability.



## Email Marketing

Automatically send smart, professional-looking messages that are personalized based on what you know about your leads and customers.

## Powerful CRM

Identify hot leads, manage opportunities and track important customer details that drive automated follow-up communications and workflow.

## Smart Automation

Leverage automation technology to create highly personalized emails and offline communications that are triggered when customers take action by clicking a link or buying a product.

## E-Commerce

Centralize your customer data and manage online purchases, billing, subscriptions and partner networks all in one place.

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To learn more about how Infusionsoft can revolutionize your business with integrated email marketing and CRM solutions, visit our website at [infusionsoft.com](http://infusionsoft.com).