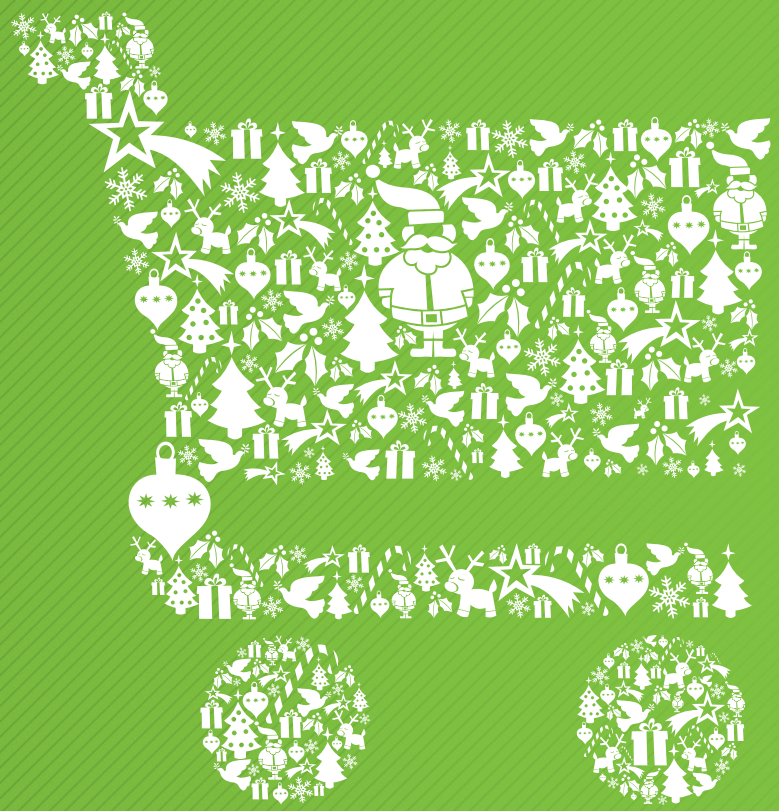
TRAINER'S BOX®

I'm Dreaming Of A Green Christmas: The Ultimate Holiday Campaign

by Adam Metz *with Peter Koury*



I'm Dreaming Of A Green Christmas:

The Ultimate Holiday Campaign

Depending on what line of business you're in, the winter holidays can be completely awesome, or really terrible. Just walk into your local fireplace store on November 1, and ask the guy behind the counter if he's excited for the holidays. Odds are, he'll say, "Absolutely." There are a lot of businesses that actually have an incredibly high dependence on the holiday season - coffee, tea, toys and a number of other multi-billion dollar industries have disproportionately high sales during this time of year.

Maybe your business does sell more in the holiday seasons, and maybe your business doesn't; that's the wonderful thing about running a holiday campaign. By tapping into your customers' hidden needs, we can go around your customers' conventional feelings about what they should be buying in the holiday season.

Re-Using This Campaign & Your Customers' Birthdays

You can, and should, re-use this campaign about five or six times per year with only a few changes. Every time you re-use it you'll be saving your company dozens of hours of work. The whole idea behind doing a solid holiday campaign is so that you can clone it, to save yourself about 60 hours of busywork over the course of a year - one and a half work weeks!

We recommend simply making a copy of your holiday campaign during July 4th, Valentine's Day, Halloween, Memorial Day, and on your clients' birthdays. Yes, you read that right: your clients' birthdays.

As long as you go about gathering your clients' birthdays around the time of their first purchase, you can launch a birthday campaign to them, year after year. The trick to doing a birthday campaign is kicking off the campaign with a no-strings-attached free gift. That way, you won't come off looking too "sales-y" in the eyes of your customers. Also, remember that making a copy of one of your existing campaigns only takes a few seconds.

Advance Prep Is Key

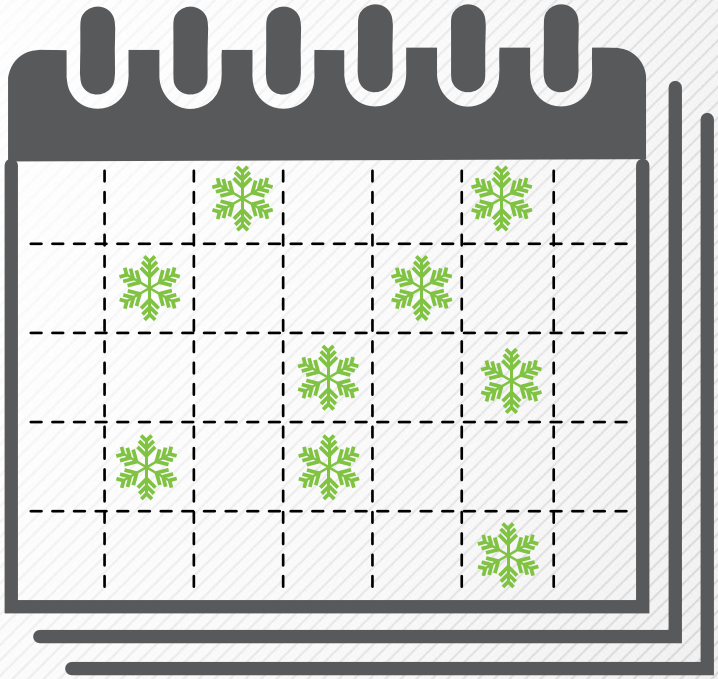
A holiday campaign will need to be ready-to-go by Thanksgiving, so it means that you'll need to prepare it between September 25 and November 20th. This eBook will break the 8-12 hours of total work needed to be done into weekly tasks to prevent you from getting overwhelmed. We've also included a checklist, so you can make sure that you've done everything you need to do at the right time.

The key to pulling off a successful campaign is NOT to do it all at once; spending a day or two straight on a campaign can be rather grueling. It's far easier to break it up into 8 or 9 short working sessions. It prevents burnout and gives you time to check in with your sales and marketing automation vendor's tech team in case you run into any technical issues.

BREAK IT UP INTO

8 OR 9

SHORT WORKING SESSIONS



"Chatter" Is High, And Your Customers' Attention Level Is Low

You need to understand that your customers are being bombarded with sales and marketing especially in November, and that any holiday campaign needs to contain four things to be truly successful:

1. It's got to have a **spectacular offer** - a 10%-off sale just isn't going to cut it.

2. It should have 9 to 12 **touchpoints**, per customer, because your customers and leads are likely to ignore 50% of those touch-points.

3. Your campaign should be shared using a combination of **"earned" and "unearned" media**. This means that it's all good to share it using social media and word-of-mouth, but it's very risky, from a business perspective, to not put some highly-targeted (and easily assessable) ad spending behind your campaign, for a short period of time.

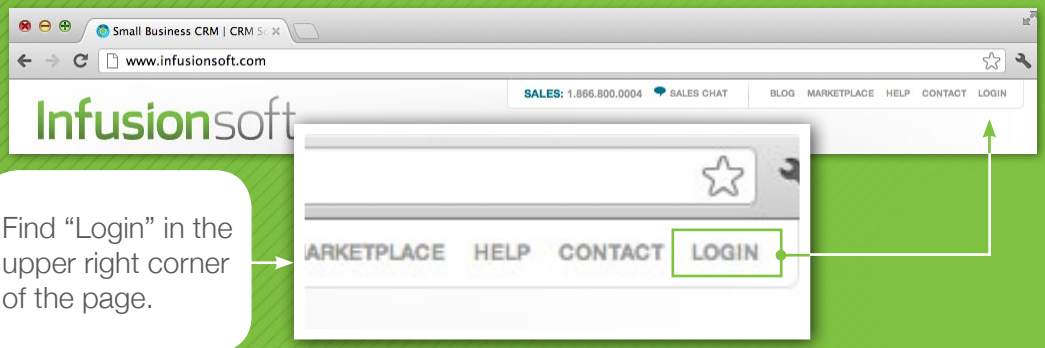
4. There should be an **online and offline component**. Remember, there is still a small percentage of your customers, perhaps as many as 5%, who are not using the Internet.

What follows is a blow-by-blow of how to set up your first holiday campaign, which you can copy to reuse, with only a few minor changes.

WEEK ONE: BASIC CAMPAIGN BUILDER SET-UP & DELEGATION

Before we get into writing all of your fancy copy, let's take a few minutes to set up the actual mechanics of your campaign. ***Just follow these steps:***

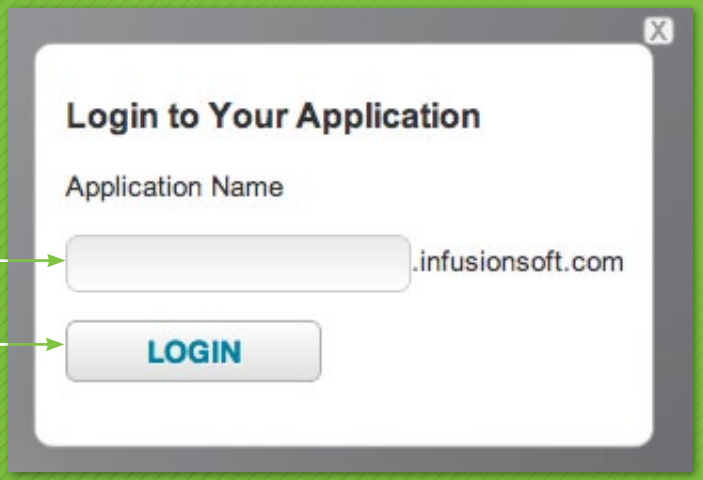
1. Open up your Infusionsoft and log in.



Find "Login" in the upper right corner of the page.

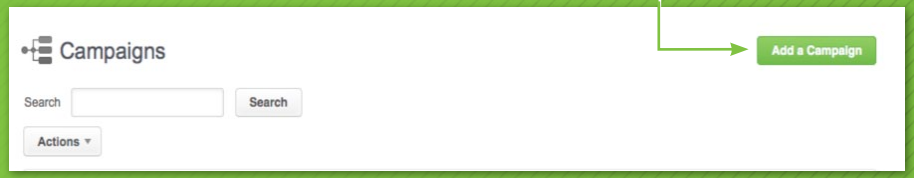
Name your campaign

After the initial Login, you can access your App directly at : yourappname. infusionsoft.com

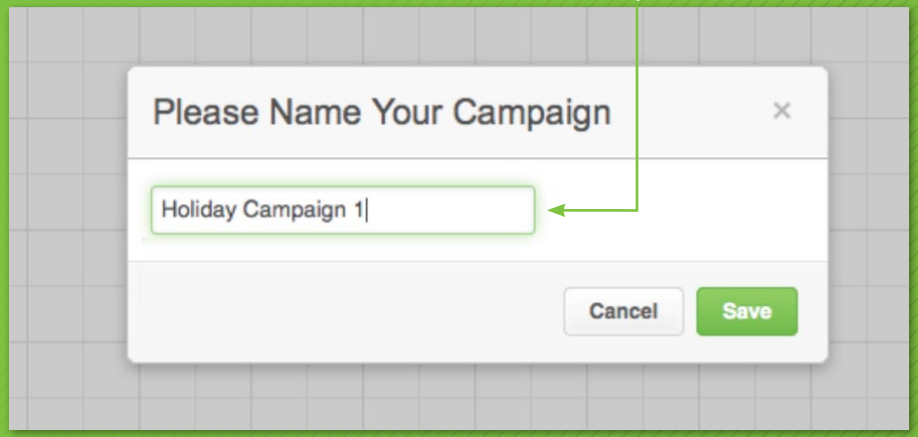


2. Hover over the Infusionsoft logo in the upper left. Go to the Marketing menu and click Campaign Builder.

3. Click the big green button on the top-right side of the page called ADD A CAMPAIGN.



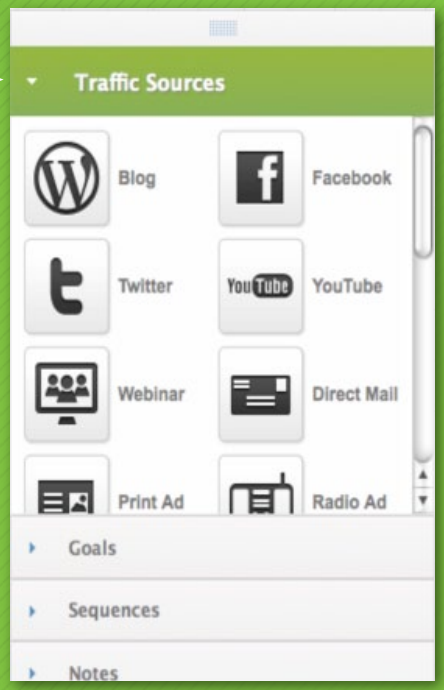
4. Name the campaign.



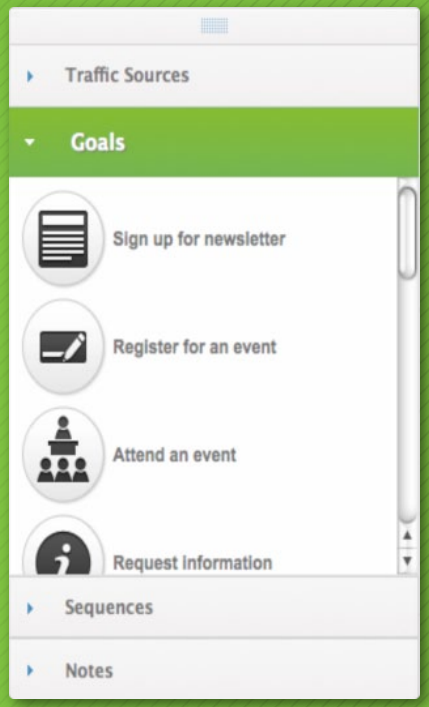
5. You'll now be taken to the Campaign Builder Page. There will be a box on the right side of that page; click the part that says Traffic Sources.

WEEK ONE: BASIC CAMPAIGN BUILDER SET-UP & DELEGATION (cont.)

Use the drag and drop functionality of Campaign Builder to create a visual map of your marketing campaign. The marketing campaign helps to fulfill the components of Lifecycle Marketing. Begin by choosing your current Traffic Sources and dragging each icon onto the page. Note, that Traffic Sources serve only as a symbolic representation of how your business captures leads.



Traffic Sources help to fulfill the "Attract Traffic" portion of Lifecycle Marketing, and should drive towards a goal. A Goal, or a magnet, helps to "Capture Leads" in the Lifecycle Marketing process. Next, select a Goal, and drag it into Campaign Builder.

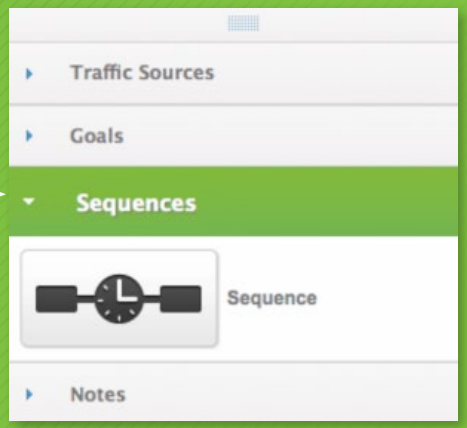


6. Drag the **Traffic Sources** that you'll be using for this campaign onto the **Campaign Builder**. We recommend beginning with *Website*, *Organic*, *Existing List* and *Other*. (Also use *Print Ad, Radio Ad, TV Ad,* if you plan on using any of those to drive traffic to your campaign).

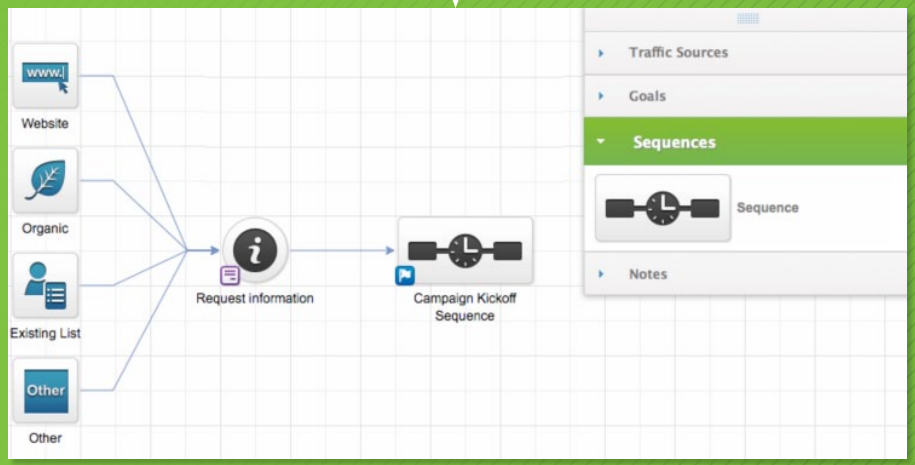
WEEK ONE: BASIC CAMPAIGN BUILDER SET-UP & DELEGATION (cont.)

7. There will be a box on the right side of that page; click the part that says **Sequences**.

As traffic sources are driven towards a goal, the goal can be completed by a variety of actions. The competetion of a goal with start a sequence. Drag the sequence into Campaign Builder.



Think of goals and sequences as complimentary items. Goals are needed to start sequences. As your vision in Campaign Builder, use connectors to help visualize the flow of information.



8. Drag one **Sequence** immediately to the right of your **Traffic Sources** on the Campaign Builder Grid.

9. Click on the Sequence's Title and change the title to "Campaign Kickoff Sequence."

10. Click on the Goals menu from the box on the right side of the Campaign Builder. Drag the icon for the Purchase Online directly above the Holiday Referral Form icon.

WEEK ONE: BASIC CAMPAIGN BUILDER SET-UP & DELEGATION (cont.)

11. Drag two more sequences onto the Campaign Builder, and place them to the right of the Holiday Referral Form goal.

12. Title the first one "**Holiday Reclaim 1**" and title the second one "**Holiday Referral 1**." Note: A black "decision diamond" will appear automatically, which indicates your customer's decision to purchase right away or to wait, which will set off your "Holiday Reclaim 1" email sequence.

13. Click on the **Existing List** traffic source and drag it's arrow to the Request Information icon. Do the same for all of your other traffic sources.

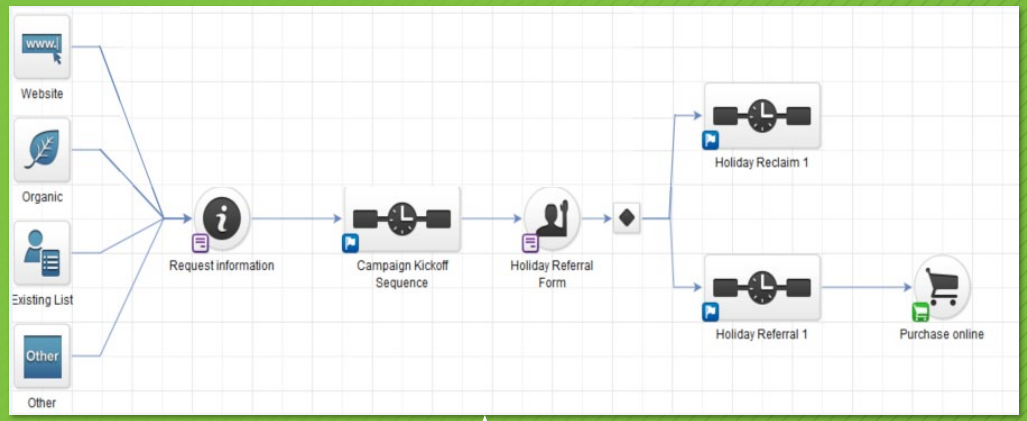
14. Using the arrows, connect the **Request Information** goal to the **Campaign Kickoff Sequence**.

15. Using the arrows, connect the **Campaign Kickoff Sequence** to the **Holiday Referral Form**.

16. Using the arrows, connect the **Holiday Referral Form** to the **Purchase Online Goal**.

17. Using the arrows, connect the **Holiday Referral Form** to **Holiday Reclaim 1** (This is where a lead goes when they choose not to purchase immediately).

This is how your holiday marketing campaign should look when you've completed these steps:



When more than one sequence follows a goal, use differentiating information on the webform to determine whish path a contact will take. Configuring the decision node (diamond icon), is the next step to assist in the split flow of information. Messaging in the sequences may be different and targeted towards a specific audience.

Now that you have completed mapping out a campaign, you can focus your attention on finalizing the details of the campaign. Double click on a goal or sequence icon to configure the set-up of each. Once open, you can use the tools to help customize each specific portion. If you require additional help use your available resources:

1. **Reference the User Guide at help.infusionsoft.com**
2. **Call Technical support at 866-800-0004**
3. **Chat online with Support Chat (found at help.infusionsoft.com)**
4. **Reach out to your Success Coach**

Remember that the campaign you have created can be replicated for future seasonal campaigns. As such, utilize a naming convention/structure to help you keep track of the various campaigns over the years.

There is a bit of task delegation to do before we get into actually creating your campaign copy. You'll need to pick two people on your team to help you execute it:

1. Pick the person on your team who will write the first draft of all marketing ****copy*.**
2. Pick the person on your team who will lay out your offline campaign component, a postcard, and then lay out the email templates and format the graphics for those emails. This person doesn't need heavy Infusionsoft experience, as learning the Infusionsoft email builder takes less than 30 minutes.

** If you're already using Infusionsoft, and the copy person you've chosen has very little experience writing marketing copy, you may want to call your account manager and ask if they can sign you up for the copy room. There's a small fee, but it's one of the best marketing copy courses out there, and it's set up to address the copy needs of specific industries.*

WEEK TWO

1. **Choose your offer:** without a really compelling offer, this whole campaign will sink. Here's a few questions to help you come up with a great offer:

What do we sell that no one else carries?

Do we carry any products where we can cut out the middle-man and sell direct to our customers?

Is there anything that we sell that we can effectively "comp" a service component on, or offer unbelievable payment terms on?

Is there something rather popular that we sell that we can create scarcity around? (i.e. a limited supply of a certain product or service)

2. **Choose your referral gift:** This is for the second part of the campaign. Remember, this gift is going from a current customer to a new or prospective customer. To determine an appropriate value for this gift, take your current new customer acquisition cost and multiply it by about 1.25. Here's why - these are higher quality leads than the leads that typically come in over the internet. They have a greater trust in your company, because they were referred by a trusted friend.

3. **Pick a customer segment:** This is the part where you actually have to select which group from your customer database should be marketed to for your campaign. You may at first think, "Let's market to all of them," and that may be appropriate in most cases. On the other hand, if you're selling a high-value item (i.e. like sport-utility vehicles), and you know that a given customer just purchased recently, you may want to opt that customer out of the campaign.

WEEK THREE

1. **Create Campaign Tags:** It only takes a few minutes to go into your sales and marketing automation software and create the four tags you'll need to run this holiday campaign. Those four tags will be called "NoHoliday1," "Holiday1Referral," "Holiday1Referrer," and "Holiday1Purchaser."

2. Write **Email 1:** *The Teaser Email*: This is the email that you'll write in order to whet your customers and leads' appetite for your campaign. Aim for this email to be about 350-500 words in length. It should contain a call-to-action button (that says "TELL ME MORE" or something similar on it) on the bottom that will deliver Email 2 immediately. Regardless, deliver Email 2 approximately 1-2 days later, whether or not the customer clicks the call-to-action button.

3. Write **Email 2:** *The Campaign Announcement*: This email will be a bit longer, and will formally announce the campaign. Shoot for 500-700 words here. The call-to-action button in this email should lead directly to your purchase order form, which we'll set up, in full, in a few weeks. Your campaign opt-out belongs in this email. Use language like, "If you're not really interested in hearing any more about this special offer, we completely understand. Just click and we will not send you any more information about." Don't use the phrase "click here" - it's a spam alert phrase.

4. **Set up "dummy" order form:** Although you don't need to customize your order form right now, simply create a new web-form for your product order, and call it HolidayCampaign Order Form. We'll work on it in a few weeks.

WEEK FOUR

1. **Email 3:** *The Intensity Builder*: If your customers didn't respond to the second email, hopefully this one will push them over the edge. Send this about two days after Email 2. Copy should be a little more intense, but not overly pushy. If you're unsure about how to "get into the customer," Dan Kennedy's book, "*The Ultimate Sales,*" Letter has an excellent chapter on this and it's available for free if you have an Amazon Kindle.

2. **Email 4:** *The First Reminder*: At this point, your customer is now in what is called a "reclaim." It means that they simply didn't respond to the first two campaign messages. Something didn't resonate with them. That's why you'll want to make sure that the tone of Email 4 and Email 5 focuses on a slightly different value proposition than the first two did. For these particular customers, you'll need to take a different approach.

3. **Email 5:** *The First Recycle Email*: Remember, this email is going to someone who basically decided, "This campaign does not resonate with me. I haven't opted out yet, but I'm getting pretty darn close." It's time to use a different tactic, or perhaps even change the offer. This sequence will go for a total of three emails. Be sure to change the value proposition to focus on the lead's new needs, if you've changed the offer.

WEEK FIVE

1. **Email 6:** *Second Recycle Email*: This is your second-to-last chance to get the lead interested in your revised campaign offer. Make the subject line time-sensitive using “action words.”

2. **Email 7:** *Third Recycle Email*: This is the last email you’ll send before you terminate the recycle campaign. If you’re thinking of using a “Last Chance”-type subject line, this would be the time to do it. With that said, don’t use words like “final” or “offer.” Perhaps try something like, “Fireplace deal ends at 6pm tonight: want in?”

WEEK SIX

1. **Postcard Copy & Layout:** At this point, you’ll want to write the copy for your free gift postcard. Keep it short and sweet and, most importantly, be sure to include the name of the referrer in big letters, bigger than your company’s name. That’s the most important part! If the new lead doesn’t know who the gift is from, they won’t redeem it.

2. **Postcard Webform:** This is where the new lead redeems their free gift. Be sure to get their email opt-in on this form, as well as their name, phone number and zip code.

WEEK SEVEN

1. **Campaign Thank-You Email:** This one's easy. It's just the email that thanks the lead for becoming a customer and placing their order - the ultimate goal of this campaign.

2. **Finalize Campaign Order Form:** Remember that if your campaign order form does not work properly and quickly, then no one can order from you. Test this repeatedly.

3. **Check Postcard Functionality:** Test-mail yourself a copy of that postcard for the campaign just to make sure it arrives in under 5 days.

4. **Set Up Tag Functionality:** Make sure all of your new tags have the proper functionality. The only way to check is simply to test them by doing a test-run of your campaign.

WEEK EIGHT

1. **Publish Your Campaign:** This is pretty straightforward, and you can do it with a single click of button, once you log in to your campaign.

2. **Add the right customers to your campaign:** This is the final step in activating your campaign to make it go live. Once it launches, you can track every step of the campaign, and even check which customers have opted out in your Campaign Builder.

Re-using the Campaign

First of all, you should be congratulating yourself on doing your first BIG campaign! Now you'll want to pull up your calendar so that you can set aside time to tweak the copy so that you can use it for future campaigns. **Here's how to do it:**

1. Jot down the dates of the holidays that you'll want to use a campaign for in the next 12 months.

2. Go backwards from that date 7 days, 14 days, 21 days and 28 days. Jot down those new dates.

3. Put a 90-minute time-block on the calendar for each of those days to revise the campaign copy (t-minus 14, t-minus 21 and t-minus 28), and then use the final day (t-minus 7) to test the copy.

Collateral Checklist (page 1)

	Notes	Which week should this be done in?	Is it done yet?
“Noholiday1” tag created	You will need this tag to create to allow customers to “turn off” this campaign, if they’re not interested in participating.	3	
Email 1 Copy	This is the “sneak preview” email that goes out before the campaign.	3	
Email 2 Copy	This is the campaign kickoff email.	3	
“Holiday1 Referral” tag created	This is the tag you will create in order to denote that a new referral has been added to your sales and marketing system. You don’t have the right to email this person until they give you verbal or written permission.	3	
“Holiday1 Referrer” tag created	This is the tag that marks one of your existing customers as a customer advocate, who has just referred a new potential customer.	3	
“Holiday1 Purchaser” tag created	This is the tag that marks one of your existing customers as someone who has completed the campaign goal.	3	
Email 3 Copy	This is the second campaign email.	4	
Email 4 Copy	This is the third campaign email.	4	
Email 5 Copy	This is the first reclaim email for someone who doesn’t open the first or second campaign email.	4	
Email 6 Copy	This is the second reclaim email for someone who doesn’t open the first or second campaign email.	5	
Email 7 Copy	This is the third reclaim email for someone who doesn’t open the first or second campaign email.	5	

Collateral Checklist (page 2)

	Notes	Which week should this be done in?	Is it done yet?
Postcard Copy	This is the copy for the “referral” postcard.	6	
Campaign Order Template	This is the order template for the campaign. You can clone this order form for future campaigns.	7	
Thank You Email	This is the email that belongs at the end of the campaign, after the customer has purchased.	7	
Publish The Campaign	This is pretty simple, and only takes a click of a button.	8	
Add The Correct Customers To The Campaign	This is the final step, where you add qualified customers and leads to your campaign.	8	
Campaign Builder Icons Laid Out?	You will do this in your sales and marketing software.	1	
Postcard Layout	You will need to complete the graphic design for your postcard, and then upload the template into your sales and marketing system.	2	
Email 8 Copy	This is the fulfillment email for when a customer fulfills the first campaign goal (purchase).	5	
Email 9 Copy	This is the thank-you email for when a customer fulfills the second campaign goal (referral to a friend).	6	
Postcard Webform	This is the webform you’ll create where people can redeem their postcard gift.	6	

Adam Metz is the author of Amazon #1 best-seller (internet marketing, advertising) *The Social Customer*. Metz is the VP of Business Development at *The Social Concept*, an executive coaching firm. *The Social Concept's* customer community, at **http://metz.customerhub.net** has nearly 1,500 members, and offers a no-cost training course on social customer relationship management.

ADAM METZ

About Infusionsoft

Infusionsoft is the only all-in-one sales and marketing software built for small businesses.

To discover the full capabilities of Infusionsoft, take a few moments to watch a quick product demonstration and see Infusionsoft in action.

>> See Infusionsoft in Action

Peter Koury is a Success Coach at *Infusionsoft* and enjoys helping small businesses succeed.