TRAINER'S BOX®

# In the pipeline

Keep, convert, and close more leads in less time with automation

Infusionsoft by Keap

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# Introduction

If you own or manage a small business, your sales process might go something like this:

Leads come into your business, and some of them become clients (of course, or you wouldn't be in business). But other times, leads disappear at various points of the process, for reasons you don't always understand.

Sometimes, you accidentally lose track of prospective clients before they get close to buying. You'd try to generate more leads, but you're not sure where your clients came from to begin with. And you can never say with certainty how many sales you're going to close this month—or what exactly your sales team is doing, anyway.

All of the above occurs in small businesses that lack a consistent process for sales—or any process at all. Sixty-eight percent of business-to-business marketers have not even identified what their sales and marketing funnels entail, according to the research firm MarketingSherpa.

Mistakes are practically inevitable when the process is undefined and sales reps rely on a collection of notes and spreadsheets to keep track of leads. As a result, the business has limited potential to scale and succeed.

Enter the solution: software. With a platform like Infusionsoft by Keap, which combines a customer relationship management (CRM) system with automation tools, small businesses can store information about leads and clients in a single database. And they can automate communication and tasks throughout the sales process, ensuring that the sale is made the way it's supposed to be.

With sales automation, follow-up emails are sent automatically, reps receive reminders about phone calls and other tasks, and the entire team has visibility into the state of affairs. Your salespeople can recall the status of each lead without digging through notes, see how much potential revenue is in the pipeline, and make changes to the process based on data, not their gut.

Sales automation software helps small businesses grow and saves them valuable time and money (and sticky notes). In this guide, we'll cover what an automated pipeline entails, explain the problems it solves, and share an in-depth example of how it works for one small business owner.

# 5 sales problems solved with automation

When an automated pipeline is created and used correctly, leads don't get lost, tactics and forecasts can be evaluated objectively, and the whole team is in the loop about what's happening. Here's a look at common, small business problems sales automation can solve.

## 1. I have a hard time keeping track of leads.

Most sales experts say that closing a sale requires several interactions with a lead—and yet most salespeople stop trying after only a couple of attempts. Continuing a game of phone and email tag takes persistence, and even the best sales reps might lose track after a few rounds. Notes get misplaced, calendar reminders accidentally get ignored, and leads slip through the cracks.

But when your sales process is automated, follow up is guaranteed to take place, regardless of how busy or forgetful you get. Using automation software, you can automate a series of attempts to make contact with a lead. Leaving a voicemail can trigger a "Sorry I just missed you" email. Another email is sent after a few days; the software reminds the rep to make another call after a few more, and so on.

When communication is automated, follow up can continue for days, weeks, and even months—and the sales rep doesn't have to rely on his memory and notes to make the next move. The software keeps tabs on every lead and client, allowing the sales rep to quickly evaluate where the lead stands in the process and recall what kind of action needs to come next.

Automation software also directs reps to the highest-priority leads. With lead scoring, the software assigns points to each lead based on actions they've taken, like opening emails and clicking links—allowing reps to recognize which leads they need to talk to today and which can wait.

## 2. I don't know why leads aren't becoming clients.

It's called a sales funnel for a reason. Every sales process begins with a large pool of prospects, which increasingly narrows as you approach the bottom of the funnel. It's a fact of business that many leads won't result in sales.

But if you're routinely generating leads and rarely closing deals, your sales process might be to blame. When you track each stage of the process in an automated sales pipeline, you can identify the stages at which you're losing the most leads—which helps you determine where to make changes.

If you find you're losing most of your leads early in the process, for example, you might be contacting them too soon. Perhaps leads would be more amenable to an initial phone call if you had previously sent a series of emails explaining how your business can help solve their problems. If leads often linger in the middle of the funnel, you could try shortening the sales cycle with an offer that entices them to buy.

A sale isn't always a black-or-white situation. The automated pipeline helps you understand the many gray areas in between "Yes, I'm ready to buy" and "No, I'm not interested."

## 3. I don't know where my leads and clients come from.

With automation software, you can identify the ways in which leads enter your pipeline—and, more importantly, track whether they ultimately became clients. Only with that information can you conclusively determine whether your sales and marketing efforts are working and make adjustments accordingly.

For example, you might have celebrated your Facebook ad as a big success because it resulted in 1,000 new leads. But if analytics from your pipeline show that only three of those leads became clients, maybe the ad wasn't so effective, after all.

Next time you run a Facebook ad, you might want to hone in on your target audience, change your messaging, or educate those leads via email before jumping onto a sales call. Or you might decide to invest in the lead sources that produce more clients. If you hosted a seminar after which fifteen of the thirty attendees became clients—and the event cost roughly as much as the Facebook ad did—then the seminar was more effective, even though it produced far fewer leads.

## 4. I don't know what my sales reps are doing.

Many small business owners and managers don't have insight into the activities of their sales reps unless they ask what everyone's working on. They hold meetings, send emails, and compare notes in an attempt to understand the state of sales in the business.

With automation software, sales team activity is recorded in one, centralized system. Leaders can log into the system to check the status of each lead, study the history of each lead's interactions with your business, and see the number of opportunities coming down the pipeline. With that visibility, leaders can identify their strongest and weakest performers, coach their teams more effectively, and more efficiently train new employees on the sales process.

## 5. I don't know how much revenue we're going to bring in this month.

Collecting notes and spreadsheets from your sales reps isn't the most scientific way to forecast future revenue. With an automated pipeline, you have a record of where each lead stands in the sales process and how much each sale would be worth. Software platforms like Infusionsoft by Keap can automatically run reports on the number of leads in each stage, the number of sales won or lost, and the projected revenue for a specific date range—allowing you to plan accordingly in the rest of the business.

# Automating each stage of the sales process

Every business has a unique sales process. Some involve only a series of calls and emails, while other businesses need in-person meetings, events, and product demonstrations to seal the deal. Some sales close after a week; others, after a year.

Still, most sales processes consist of the same basic stages. A new lead is identified, and a sales rep contacts the lead and determines whether he or she is a good fit for the business. After the sales rep works the lead, the process ends one of two ways: a win or a loss.

By automating activities in each of these stages, you ensure the sales process plays out the same way every time and ensure visibility into each stage. Manual work is still required: The sales rep needs to use the software every day to monitor activity and move a lead from one stage to the next. (The software can't know the outcome of a phone call, for example).

1. **New opportunity**

   What it is: The software tags a contact as a new lead as a result of an action she took, like completing a webform.

   What happens: After being alerted to the new opportunity, the sales rep moves the lead into the next stage.

2. **Contacting**

   What it is: The rep attempts to make contact with the lead.

   What happens: Your sales rep reaches out via phone, email, or both. In this stage, the lead can receive a series of automated emails that help the sales rep follow up. The lead remains in this stage until contact is made.

3. **Engaging**

   What is it: The lead is moved into this stage when the rep successfully makes contact with her.

What happens: The lead and sales rep are talking about your business' offerings. Here, the rep might send automated emails that help educate the lead or automated requests for information needed to evaluate her as a prospective client.

4. **Qualified**

   What it is: The lead is officially qualified, meaning she has the budget and authority to make a purchase.

   What happens: Communication between the leads and sales rep may continue.

5. **Custom stages**

   What it is: Now that the lead has been qualified, your specific business processes come into play.

   What happens: Depending on the needs of your business, this stage might involve something like an in-person meeting, a product demonstration, or the mailing of a product sample—all of which can be executed with the help of automation.

6. **Closing**

   What it is: The lead enters the final stage of your sales process before becoming (or not becoming) a customer.

   What happens: This stage might include steps needed to finalize or formalize the deal, like negotiating a quote with the lead or asking her to sign a contract.

7. **Won/Lost**

   What it is: The sales process culminates with one of two outcomes: winning a new customer or losing the lead.

   What happens: In this stage, you could configure two automated sequences based on the outcome. For a win, you might use automation to send a series of welcome emails educating the new customer about your products or services. If the lead decides not to buy, you could tag her as a dead lead to ensure you don't try to sell her again. But if she's simply not ready to buy, an automated sequence could remind you to call her again in six months.

# How one bookkeeping firm quadrupled sales with automation

**Holly DeVito, CEO**, Sum of All Numbers

**Fremont, California**

Holly DeVito knew that her bookkeeping and financial services firm sometimes lost track of prospective clients. The salesperson at Sum of All Numbers typically called a lead once or twice before becoming too busy to follow up again—or simply forgetting to do so.

But not until the salesperson left the company did DeVito gain full insight into the sales process—or lack thereof. When she took over the sales role, DeVito inherited hand-scribbled notes here, spreadsheets there, and no method for tracking the status of each lead.

“This is a big mess,” she determined, “and we’re not doing this anymore.”

DeVito used Infusionsoft by Keap to create an automated pipeline that provides oversight of each sales stage: from contact attempts to the initial consultation, evaluation, completion of paperwork, and signing of the contract.

Leads no longer fall through the cracks because of automated processes in which the software sends follow-up emails and reminds reps to make phone calls. And with the sales team (which now includes three staff members) all using the same system, DeVito can now rely on the software instead of daily meetings for status updates.

“I can log in at any time and see how many opportunities we’ve had this week, how many calls we’ve had, who’s done what,” she said. “I don’t have to ask every day, ‘What’s going on with this lead? What’s the status of this one?’”

As a result, DeVito has experienced less stress, more time—and a massive growth in leads and sales.

In the first three months of using the automated pipeline, Sum of All Numbers quadrupled the number of clients it acquires each month. Instead of three to five new clients per month, the firm lands about twenty.

DeVito believes that Sum of All Numbers is now on track to grow from $1 million in annual revenue to $10 million in the next ten years. “There’s no way we could scale to that size without having these systems in place,” she said.

Here’s a detailed look at how Sum of All Numbers closes a sale—the automated way.

# Anatomy of a sale: Sum of All Numbers

1. **Capture the lead**

   Leads enter the pipeline by completing a webform for a free consultation. If the lead calls, a receptionist records contact information and notes in an internal form within the software.

2. **Assign responsibility**

   When the form is submitted, the software automatically assigns a sales rep to the lead on a round-robin basis. The rep receives a notification to call the prospective client. Example:

   **Task**: Schedule appointment with [Name] from [Business] at [Phone Number].

   **Assigned to**: Alex

   **Due at**: 4:00PM

3. **Attempt to make contact**

   When the sales rep calls the lead for the first time and reaches voicemail, she makes a note in the software to start an automated follow-up sequence. Over the next three weeks, the software sends three emails and reminds the rep to make two more phone calls in an attempt to reach the lead.

### Email No. 1

**Subject**: Sorry I missed you

Hi [First Name]!

Thank you for your interest in working with Sum of All Numbers. I left a voicemail at [Phone Number], as I missed connecting with you today. I attached our evaluation form and Getting Started Guide for you to become acquainted with our procedures. Please reply with the best time of day to reach you so that we can connect...

### Call No. 2

### Call No. 3

### Email No. 2

**Subject**: 3 Reasons to Outsource Bookkeeping to a Team

Every business owner comes to a point when it is time to change accounting procedures. Many clients come to us suffering from exhaustion with the unpredictable turnover of their bookkeeping staff...

### Email No. 3

**Subject**: Are you still interested?

A few weeks ago, I was informed that you were interested in learning more about how Sum of All Numbers can help your business. I have tried to reach you a few times but have been unsuccessful. If you're no longer interested in our services, please let me know so I can stop bothering you...

4. **Connect with a consultation**

   When the sales rep successfully connects with the lead for a consultation, she uses a form within the software to record the outcome of the call. The completed form triggers an automated sequence for one of these scenarios.

- **Collect the necessary paperwork**

  After determining the lead is a potential fit, the sales rep sends an evaluation form and other documents to be completed. If the lead doesn't return the forms, the software sends reminder emails and tasks the rep to follow up with phone calls over the next month.

- **Keep in touch with a not-yet-ready lead**

  If the lead isn't ready to buy, the sales rep adds him to the monthly e-newsletter list. One year later, the software reminds the rep to check in with a phone call.

- **Determine it's time to let go**

  If she determines the lead is not qualified or not interested, the sales rep applies a tag in the software to stop communication.

5. **Make a proposal**

   When Sum of All Numbers has qualified the lead and collected the required paperwork, the sales rep sends a proposal, leading to one of two scenarios.

   - The proposal is accepted
   - The lead signs a contract, and Sum of All Numbers has a new client
   - The proposal is rejected
   - The sales rep adds the lead to the newsletter list. In six months, the software will task the rep with calling back to see if his needs have changed.

6. **Welcome the new client**

   When the contract is signed, the software recognizes the contact as a new client—in which case it's time to schedule an onboarding meeting and send welcome emails and surveys. Another automated sequence begins.

# Conclusion

Using automation software in your sales process ensures that every lead is accounted for, that contact information and notes are readily available, and that you always know what you need to do next to move the deal along. With that information, you can more accurately make revenue forecasts and process changes that result in noticeable business improvements.

You don't need software to close a sale. But when you use it, you can close more sales, more consistently and more efficiently—allowing your business to grow and succeed.