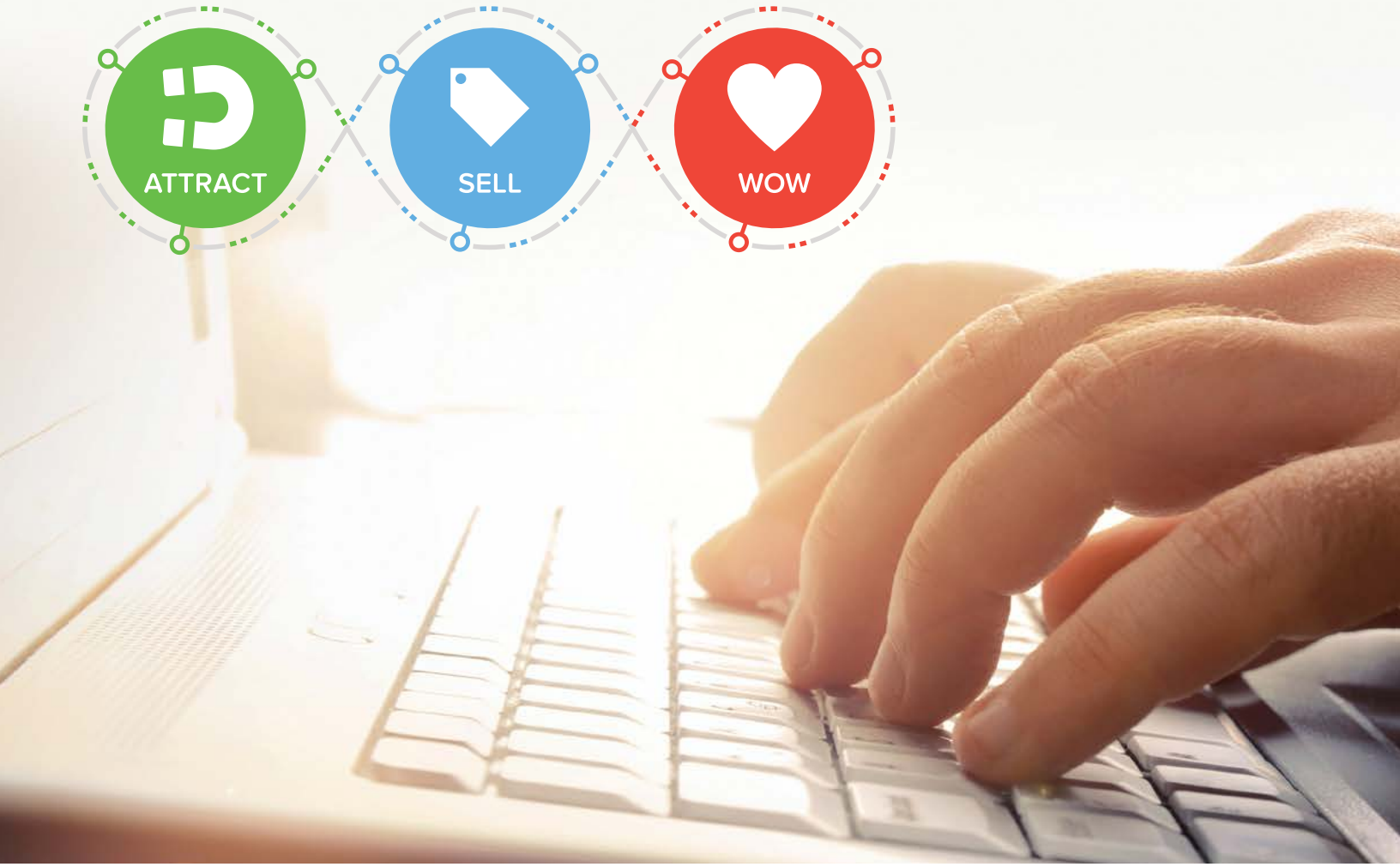
Infusionsoft

In partnership with
Business Fluid

Lifecycle Marketing



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PLANNER

WELCOME

Creating a sales and marketing strategy for your small business can be daunting. Marketing your business involves more than an amazing storefront, nice signage, a well-designed website and a blanket of ads across your local market.

It's a strategic plan that includes tactics and tools that are precisely targeted to the audience that you're trying to attract. The Lifecycle Marketing framework has proven ideas and innovative strategies designed **to help you get more customers, grow your sales and save time**.

This planner contains everything you need to keep your small business on track for the next week, month and year. You can use this planner to record ideas and insights about the biggest opportunities you see in your marketing and sales strategies.

Yes, it will be hard work. And yes, Infusionsoft will be right here with you as you do it. Let's create a sales and marketing strategy together, one step at a time.

Now, let's get started!



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INTRODUCTION

Infusionsoft's Lifecycle Marketing framework provides a simple model that you can use to attract leads, grow sales and wow your customers.

Lifecycle Marketing was developed by a team of sales and marketing experts at Infusionsoft, and has helped thousands of small businesses achieve success.

The beauty of Lifecycle Marketing is in the simplicity of the framework, which can be applied to any small business, regardless of industry or business model. When put into action, Lifecycle Marketing will help you grow sales AND give you more time to focus on the things you love.



When put in to action, Lifecycle Marketing will help you grow sales AND give you more time to focus on the things you love.

Lifecycle Marketing

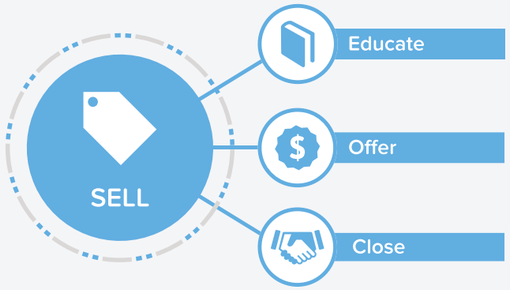
SALES & MARKETING STRATEGY FOR SMALL BUSINESS





ATTRACT is the first phase in the Lifecycle Marketing framework. In this phase, you will focus on these stages:

- Know Your Target Customer
- Attract Interest
- Collect Leads



SELL is the second phase in the Lifecycle Marketing framework. Here you will learn how to convert followers to fans by focusing on these stages:

- Educate
- Offer
- Close



WOW is the third and final phase in the Lifecycle Marketing framework. This phase is designed to help you create raving fans and keep them coming back for more. In this phase you will:

- Deliver and Wow
- Offer More
- Get Referrals



GETTING STARTED

Review the questions in each of the 3 phases. Select each statement where the answer is yes. Assign one point to each of those statements and total your score for each phase. The phase with the lowest score should be your starting point in building your Lifecycle Marketing strategy. If there is no clear phase to begin with, we recommend that you start with the Attract phase.

Attract:

- [ ] I'm clear about who my target audience is.
- [ ] I know the pain points of my target audience.
- [ ] I understand what my target audience cares about.
- [ ] I'm clear about who is not my target audience.
- [ ] I understand what makes my business stand out from the crowd.
- [ ] I know where my customers 'hang out'.
- [ ] I have a formal process for generating leads.
- [ ] I currently utilize lead magnets to attract traffic to my business.
- [ ] I use more than 2 types of lead magnets.
- [ ] I utilize social media to attract traffic to my business.
- [ ] I have a formal process for collecting prospect information.
- [ ] I have a system to organize potential customers once I have their information.

TOTAL POINTS: _____

Sell:

- [ ] I anticipate questions that potential customers have before they buy from me.
- [ ] I have a clear content strategy.
- [ ] I have clarity around my compelling offer.
- [ ] I know how potential customers make decisions on what and when to buy.
- [ ] I understand my customer's buying journey.
- [ ] My sales process is mapped to my customer's buying process.
- [ ] I have a system in place to identify when someone is ready to buy.
- [ ] I understand what offers work to convert sales.
- [ ] I have a clear process for closing the sale.
- [ ] It's easy to buy from me.
- [ ] My sales team has been fully trained on sales procedures.
- [ ] I have a strategic plan for making it even easier to buy from me.

TOTAL POINTS: _____

Wow:

- [ ] I have a consistent plan to wow my customers.
- [ ] I fulfill on time or early if possible.
- [ ] I provide a quality service or product.
- [ ] I send a personal thank you note to customers.
- [ ] I send a small thank you gift to customers.
- [ ] I call my customers to check-in and thank them.
- [ ] I have a process to generate repeat sales.
- [ ] I have a customer loyalty program.
- [ ] I offer additional product/service at the point of sale.
- [ ] I have a formal referral program.
- [ ] I have a process to ask every customer for referrals.
- [ ] I have a formal incentive program to reward people who refer others.

TOTAL POINTS: _____

IDENTIFY YOUR TARGET MARKET

As an entrepreneur, you have big dreams. You want the entire world to know your products and services are available to everyone.

It can be easy to spend huge sums of money trying to attract the world to your products and services, only to find that you've overspent your budgets and you don't have any new customers.

It's hard to get noticed in this clutter filled world, but attempting to reach everybody with your product or service is not only inefficient, it's also very expensive. That's why it's important to narrowly define your target customer and meet them where they are.

Who are my ideal customers? (Use demographics such as age, annual income and education level. Use psychographic information such as behaviors, hobbies and values.)

What are their pain points? (Efficiency, ease of use, time, etc.)

Why should they buy from me (and not my competitor)?

What are their most common objections to doing business with me? (Cost, time etc.)

Who is NOT my target customer?



KEY ACTIONS IN THE NEXT 30 DAYS:



Build My Target Customer

Demographics: the average or typical characteristics of your target market .

Psychographics: what motivates them to take action.

Age

Gender

Marital Status

Children

Income

Education

Region

Hobbies

Values

ATTRACT MORE CUSTOMERS TO YOUR BUSINESS

Once you know who your target customers are, you’ll need to find out where they are most likely to come in contact with your brand, and be receptive to your messaging.

Think about location both online and in person. Are they on a particular social media platform? Do they attend local business events? Are they members of a local community or work in the neighborhood?

After you’ve identified where they are, start focusing your efforts there. Perhaps this means that you need to join a local networking group, open up a Twitter account or spend some money on advertising. Be where your customers are and start engaging with them in an authentic, helpful and personable way.

Use lead magnets, like videos, free reports, coupons or giveaways to attract more of your target audience to your business.

Where do my customers “hang out”? (Social media, online, conferences, etc.)



KEY ACTIONS IN THE NEXT 30 DAYS:

What would attract them to my products and services?
(Educational materials, reports, etc.)

What lead magnets are currently working? (Coupons, contests, free trial, etc.)

New lead magnet ideas: (Videos, samples, etc.)



Opportunity Analyzer

Number of leads captured from visitors to my website today:

Number of leads captured from visitors to my website 6 months after implementing lead generation strategies:

Subtract box 1 from box 2 [Number of leads captured 6 months after implementing lead generation strategies] - [Number of leads captured today] :

Topics to Brainstorm

What are some common mistakes that you help people avoid?

- 3 mistakes most people make when [*buying their first home, cleaning their pool*]
- Do you make these 3 mistakes in [*raising your children*]?
- 3 common [*investing*] mistakes you don't know you're making

What are the frustrations people have when they buy from your competitors?

- 3 questions to ask your [*pool repair guy*] before you hire him
- 3 mistakes that rookie [*lawyers*] make when [*writing wills*]
- 3 things to consider when [*choosing your pest control company*]
- The 3 biggest problems with [*public schools*]

What are the underlying goals your customers have?

- 3 tips for successfully [*publishing*] your [*first book*]
- 3 things you absolutely need to know about [*lawn care*]
- 3 proven techniques to [*increase your energy*]
- 3 new tricks to [*get on the first page of google*]
- 3 keys to fixing your [*scorpion*] problem

What are your customers curious about or trying to learn?

- 3 Questions I always get asked about [*investing*]
- 3 things they should have taught in [*college*] about [*investing*]
- 3 Tips for dealing with [*bratty kids, nosy neighbors*]

Map My Lead Magnet

Identify your lead magnet gaps and categorize them below.

	URGENT	NOT URGENT
IMPORTANT	I need this type of lead magnet yesterday:	I already have this lead magnet and it's working:
UNIMPORTANT	I already have this magnet but its not working. I need to trash it:	I don't need this lead magnet:

COLLECT VISITORS' INFORMATION TO FOLLOW UP

As you begin attracting more customers to your business, you'll want to make sure they don't leave and forget about you.

Now that you've attracted the right audience, you need to either make the sale or get their contact information so you can follow up with the leads that aren't ready to buy just yet. You can capture leads by providing them with something of value in exchange for their contact information, like a free trial or sample of your product or service. Build trust and give your prospects a reason to opt in. E-books, podcasts, videos, webinars and downloads are just a few content assets that you can offer to build trust with your audience and establish credibility for your brand. Make it easy to opt in with the right lead capture tools, like a web form on your blog or website.

How many visitors am I attracting and collecting each month using the following?

Website: _____ Networking: _____

Events: _____ Social Media: _____

Blog: _____ PPC: _____

Direct Mail: _____ SEO/SEM: _____

Telephone: _____ Walk-in: _____

How can I capture their information?

- ☐ Discussion board
- ☐ Demo
- ☐ Drawing/Contest
- ☐ Networking events
- ☐ Webform
- ☐ Badge scanner
- ☐ Have employees ask
- ☐ Lead Generation Card (on social media)

Other lead capture methods:

What can I use to organize potential customers once I have their information? (Database, spreadsheets, CRM, etc.)

Where are my lead collection gaps?



KEY ACTIONS IN THE NEXT 30 DAYS:

EDUCATE TO SELL MORE

Consumers will only pay attention to you when they're motivated to do so, and the best way to gain their attention is through interaction and education.

It's important to understand your target customer before you can create content that's relevant to them. As you build out your content strategy, consider how your message serves your target customer's basic psychological or self-fulfillment needs. Then, build foundational content on your website, blog, social networks or other communication platforms that addresses those needs.

What questions do potential customers have before they buy from me? (Product details, cost, warranty, social proof, etc.)

How can I address those concerns? (Email series, white paper, website, videos.)

Where can I address those concerns? (Blog, social media, newsletters, etc.)



KEY ACTIONS IN THE NEXT 30 DAYS:



MAKE THE OFFER

In order to make the right offer at the right time, it's important to understand your target customer's buying process—the journey a customer goes through before they decide to buy (or not buy) from you.

The best way to do this is to observe past customers' actions and create a buying process map. Then, match your sales process to their buying process.

If you have a sales team (or if you are the entire sales team) you'll want to optimize your resources so that you spend your limited time with consumers that are qualified. **Lead scoring** is tracking your prospects' behaviors and activities, so you can determine their varying levels of interest in your solution. It's a great tactic to use that will help ensure that you spend your limited time on the people who are most likely to convert.

What is my compelling offer? (What solution do I provide that addresses my customers' pain points?)

When should I extend the offer? (After they read the e-book, after a conference, when they initiate a call with a sales rep, etc.)

What does my customer's buying journey look like?
(How are buyers getting from step one ("Do I have a need?") to a justified decision?)

How do I know when a prospect is "hot"?

What are some key objections that I will need to overcome?

What offers work to convert sales?

What happens to everyone else who doesn't decide to purchase right away?



KEY ACTIONS IN THE NEXT 30 DAYS:



Opportunity Analyzer

Number of prospects we lose touch with each month because they aren't ready to buy today?

Value of those lost leads:

(This is based on your percentage of leads who don't convert to customers... so start with your conversion rate and work backwards.)



CLOSE MORE SALES

Closing the sale involves more than just an exchange of money or signed documents.

In a direct sales conversation, the close involves clear communication, good presence and written documentation. In an eCommerce business, the close involves ensuring that there is a mechanism for collecting payments and processing the order. Regardless of your business type, the close is the signal that the deal has been negotiated and you can now begin the process of delivery (and eventually sell more).

How do customers buy from me? (Online, in person, sales team)

How do I make it easy to buy from me?

How can I make it even easier?

What are the top 3 things I can do to improve my selling system?

1.

2.

3.



KEY ACTIONS IN THE NEXT 30 DAYS:

CREATE A CULTURE OF WOW

The first step in wowing your customers involves delivering more than what you promised. This may seem simple and obvious, but in the hustle and bustle of daily work, it's often overlooked.

Think about the last time you were completely impressed by a company. You probably did business with them more than once, and maybe even told a few of your friends about it. Wowing your customers involves going the extra mile to create a memorable, delightful experience that will create customers for life. Satisfy customers by providing the service or product that your customers pay for in a timely fashion. Then wow them by going above and beyond their expectations and provide additional value.

What are 5 things I can do to wow my customers during the first 30 days? Send cards, quality and unique packaging, coupons, personal phone call, etc.)

1.

2.

3.

4.

5.

What are 5 things I can do to continue to wow my customers after the first 30 days? (Periodic surveys, birthday cards, holiday announcements, etc.)

1.

2.

3.

4.

5.

What can I do to ensure my customers are enjoying the service or products they paid for? (Follow-up email, survey, customer satisfaction tool, etc.)

How can I find out how my customers are feeling? (Surveys, email, phone call, etc.)

When a customer isn't happy, what can I do to reach out and make the situation better?

Circle your top 2 ideas for each category and start to put a plan in place.

KEY ACTIONS IN THE NEXT 30 DAYS:



GROW THE VALUE OF EACH CUSTOMER

The second stage in creating an experience that Wows your customers involves offering more.

Determining what to offer and when to offer it involves a bit of strategy. The easiest way to do this is to determine how you can help your target customers today and in the future. The solution doesn't have to be your specific product or service nor does it have to result in a sale. Your solution can be as easy as providing tips and resources related to their inquiries. Here are three ways to tactfully increase your revenue while continuing to be helpful:

- **Cross sell**: Customers aren't always aware of the perfect product or service pairings, and may be willing to purchase related items that enhance their experience.
- **Upsell**: Listen to your customers and try to understand their needs. They might be willing to pay extra for special treatment, warranties or monthly programs.
- **New products**: Remember to help your customers by identifying things that will enhance their lives by notifying them of new products or services.

What products do I offer that are often purchased together, or that customers would consider a must-have based on their previous buying history? (Accessories, software)

What are my upsell opportunities? What can I offer as a higher level of service? (Warranty, special treatment, etc.)

What do I do to encourage existing customers to buy new products?



KEY ACTIONS IN THE NEXT 30 DAYS:



Opportunity Analyzer

Number of one-time customers that I could turn into repeat customers by upselling and encouraging them to buy new products.

Lifetime value of a customer:

GROW SALES WITH REFERRALS

Asking for referrals and rewarding customers who refer your business to their friends and networks completes the final stage of the Wow experience.

Effective referral programs are a big win for small businesses because they help customers develop habits that include your company. Consider establishing a referral program with rewards that are easy to obtain. Providing small gift cards, discounts or movie tickets for referrals is a great way to demonstrate your appreciation.

When a customer is happy, how can I ask for referrals, repeat sales or testimonials? (Surveys, cards, etc.)

How do I reward customers who refer? (Surveys, email, phone call, etc.)

What do I do to systematically ask for referrals?

KEY ACTIONS IN THE NEXT 30 DAYS:

WOW MY CUSTOMERS WORKSHEET

1. Check the box next to the items that you could use to wow your customers.
2. Sparked a new idea? Add additional thoughts in the space provided.

50 Cost-effective ways to wow your customers:

- [ ] Fulfill orders on time
- [ ] Follow-up with emails
- [ ] Answer questions that they pose
- [ ] Send a $5 gift card with every purchase
- [ ] Start a rewards or loyalty program
- [ ] Provide a surprise discount
- [ ] Send a book with a personal note
- [ ] Send a pizza or a pizza gift card
- [ ] Provide special private shopping hours or prizes during certain hours
- [ ] Throw a party for all of your customers at your next major event
- [ ] Provide a gift card for an item in your store or on your website
- [ ] Provide offers to customers who contribute ideas or engage with your company online
- [ ] Celebrate an event, such as a birthday or anniversary
- [ ] Celebrate a milestone, such as number of years as a customer
- [ ] Send a gift card for a free car wash
- [ ] Offer free wrapping for product purchases
- [ ] Name a star after their company
- [ ] Send a box of office supplies
- [ ] Send them a Payday candy bar
- [ ] Provide group/bulk order opportunities
- [ ] Follow them on Twitter
- [ ] Give them bonus items
- [ ] Send personalized address labels
- [ ] Send samples of new products
- [ ] Give a night out at the movies
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] Respond to complaints
- [ ] Call them and say thank you
- [ ] Send a handwritten thank you note
- [ ] Send a lottery ticket with every purchase
- [ ] Feature a customer on your website
- [ ] Send cookies, fruit, or flowers
- [ ] Donate on behalf of your customer
- [ ] Plant a tree on behalf of your customer
- [ ] Meet up with customers in the cities that you are visiting
- [ ] Randomly select a few customers to receive a product that you upsell
- [ ] Provide an upgrade for free
- [ ] Send unique swag, such as a guitar pick earrings for music lovers or sippy cups for parents with kids
- [ ] Schedule lunch at your office and invite customers to attend and share feedback
- [ ] Tell your customers how their feedback was implemented
- [ ] Give them a free song download
- [ ] Include a free USB flash drive with their order
- [ ] Send a laminated reference guide or chart
- [ ] Create a video message and send it via email
- [ ] Send a small gift
- [ ] Upgrade their shipping to priority mail
- [ ] Hire them
- [ ] Pre-order exclusive items
- [ ] Give them an inexpensive photo album
- [ ] Provide a make-over related to your product
- [ ] Send them a travel mug filled with tea
- [ ] _____
- [ ] _____
- [ ] _____

NOTES

MAP YOUR LIFECYCLE MARKETING STRATEGY

Based on your results in the “Getting Started” section & in each individual section define your desired goals for the next 30 days. Use this page to map your strategy for each of the 9 stages. Once you’ve begun to implement your new Lifecycle Marketing strategy you need to track your progress. Use this data to determine where to improve upon your strategy.



TARGET:



ATTRACT INTEREST:



COLLECT LEADS:



EDUCATE:



OFFER:



CLOSE:



DELIVER & WOW:



OFFER MORE:



GET REFERRALS:

NOTES

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Infusionsoft is the leading sales and marketing software built for small businesses. Our software, services and educational content help small businesses get organized, grow sales and save time. By combining sales and marketing tools in one system, we help entrepreneurs save time and simplify operations.

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