

We Help Small
Businesses
Succeed

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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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Lifecycle Marketing



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!

A top-down view of a woman with a long brown braid, wearing a white shirt, sitting at a wooden desk. She is looking at a laptop. The desk is cluttered with papers, sticky notes, and a glass. A semi-transparent dark blue box with white text is overlaid on the image.

The Lifecycle Marketing framework will help you get more leads, grow your sales and save time.

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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:

It's important to narrowly define your target customer and meet them where they are.



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.)



(Educational materials, reports, etc.)



- ✓ 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*]

- ✓ 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]*

The diagram is a 2x2 matrix with dashed lines. The vertical axis is labeled 'IMPORTANT' on the left and 'UNIMPORTANT' on the right. The horizontal axis is labeled 'URGENT' on the top and 'NOT URGENT' on the bottom. The four quadrants contain the following text:

- Top-Left (Important & Urgent):** I need this type of lead magnet yesterday:
- Top-Right (Important & Not Urgent):** I already have this lead magnet and it's working:
- Bottom-Left (Unimportant & Urgent):** I already have this magnet but its not working. I need to trash it:
- Bottom-Right (Unimportant & Not Urgent):** I don't need this lead magnet:



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

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

How can I capture their information?

- 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?





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.)





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.

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.

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



(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:



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.)

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





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.





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:



- ## 50 Cost-effective ways to wow your customers:

- ## 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