

# SALES PROFIT ACCELERATION

REPEATABLE RESULTS from 6000 campaigns for 2300+ clients from Fortune 100s to solo consultants

*“Projected revenue of 4 million.”*

**Freight Systems**

*“Uplift of 45%.”*

**Mega Billion Online Shopping Platform**

*“Meetings increased by 64%,  
expense reduced by 50%.”*

**Health Insurance Broker**

**Joe Prospect**

*“The lifetime value of each client is \$72,000 so we generated \$504,000 from our campaign.”*

**Executive Coach**

*“The campaign generated 100 new customers representing \$2,000,000 per year in new revenue.”*

**Commercial Limousine Service**

*“Given the results to date, we would be crazy to terminate your services!”*

**Manufacturing SaaS**

*“The real value of this program is that long-term income stream and the value it increases my business by. This is a no-brainer to me.”*

**Accountant**

*“Doubled our annual optimization targets last year”*

**Music Software Company**

**SIMPLE REPEATABLE Marketing Strategies that work for the big guys and small guys**

Copyright © 2023 Joe Prospect.

All rights reserved. No part of this publication may be reproduced, distributed or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other noncommercial uses permitted by copyright law. For permission requests, write to the publisher, addressed “Attention: Permissions Coordinator,” at the email address below.

Joe Prospect  
joe@joeProspect.com  
<http://joeProspect.com>

Sales / Profit Acceleration, Joe Prospect -- 1st ed ISBN 978-x-xxxxxx-xx-x

The information in this book came from working with and learning from more than 2,300 marketing clients ranging from companies like HP, Google, AMEX, and Cisco to SMBs across all industry sectors, AND listening to thousands of their prospects. When you *listen* to your prospects, you will get your marketing right, and it *will* generate sales and increase the value of your business.

---

***“The lifetime value of each client is \$72,000 so we generated \$504,000 from our campaign.”***

**Executive Coach**

---

***“Our number of meetings increased by 64% at the same time that our marketing expense was reduced by 50%.”***

**#1 Health Insurance Broker**

---

***“The real value of this program is that long-term income stream and the value it increases my business by. This is a no brainer to me because I’m handing out a dollar and getting 5 or 10 back.”***

**Accountant**

---

***“We have seen remarkable success in the first 10 weeks of our marketing program including projected revenue of \$4 million.”***

**Freight Systems**

---

***“Given the results to date, I would be crazy to terminate your services!”***

**Manufacturing SaaS**

---

***“The campaign generated 100 new customers representing \$2,000,000 per year in new revenue.”***

**Commercial Limousine Service**

---

To remind the reader of the importance of thinking about your marketing from the perspective of your prospect, the honorary author of this book is the *Everyman* prospect - Joe Prospect.

# CONTENTS

<i>Introduction</i> .....	9
1. Joe’s BIG Marketing Strategy Mistake #1: Looking at Your Marketing as a Series of Programs and Activities – Not a System .....	15
2. Joe’s BIG Marketing Strategy Mistake #2: Jumping from One Marketing Strategy to the Next Every 30-90 Days.....	23
3. Joe’s BIG Marketing Strategy Mistakes #3, 3a and 3b: Pricing Too Little, Selling Too Little, Seeing Too Little .....	31
4. Joe’s Tactical Marketing Mistake #1: Looking Like the Rest of Your Herd.....	41
5. Joe’s Tactical Marketing Mistake #2: Finding Other Ways to Get Dumped into the ‘Seen That Done That’ File .....	49
6. Joe’s Tactical Marketing Mistake # 3: Burying Your Evidence.....	71
7. Joe’s Tactical Marketing Mistake # 4: Making it All About You.....	85
8. Joe’s Tactical Marketing Mistake #5: Not Looking Past the End of Your Nose-Staying Stuck in Your Own Marketing Silo .....	99
9. Joe’s BIG Tactical Marketing Mistake # 6: Failing to Plug the Cracks in Your Marketing System .....	107
10. Real Live Example #1 of the Marketing & Sales Operating System in Action: Design/Builder of Industrial Ventilation Systems .....	115
11. Real Live Example #2 of the Marketing & Sales Operating System in Action: User Experience Consultant to Software Companies.....	129
12. Real Live Example #3 of the Marketing & Sales Operating System in Action: BIM/CAD Working Drawing Outsourcing Consultant for Architects.....	139
<i>Joe’s Final Advice</i> .....	155

# INTRODUCTION

Are you tired of trying to move the Rock all by yourself?



If you recognize yourself in this picture and you feel like this, then you're not alone. If you a Marketing Director, Sales Manager, CMO, CEO, business owner, or solo consultant, you may feel like the complete weight and responsibility for growing the sales of your business, is on *your* shoulders. You feel like you have to make all the marketing and sales decisions and you're struggling all the time to make sure you're making the right decisions, which are so critical to the growth and *survival* of your business.

Marketing and Sales is such a convoluted constantly shifting thing to figure out. And it is a real struggle. This book is designed to provide you with an experienced *inside partner*, me **Joe Prospect**, to help you grow your business by sharing my

proven marketing and sales strategies based on my inside knowledge of 6,000 marketing campaigns for more than [2,300 clients](#) from Fortune 100s to SMBs across all industry sectors.

This isn't just another marketing book. It is clear-headed documentation of how my group of marketing agencies (*I ran their operations, not them*) were able to onboard up to one new client a day in highly competitive big-ticket industries. In this book, you will see the marketing strategy that enabled us to acquire over 2,300 clients from solo consultants to Fortune 100 companies, and you will learn the exact marketing strategies that have proven to be the most successful for our clients in each industry sector. The book also takes a hard look at the reasons why marketing fails and why it wins. The winning strategies will surprise you. It is not necessarily spectacular marketing that wins. The strategies that have worked consistently challenge a lot of the crap-brained marketing assumptions and theories that are floating around. The strategies that are generating the best results may seem strange and make you more than a little uncomfortable – *like moving to a different marketing planet*.

The book is organized around nine sure-fire ways to fail at your marketing. One or two won't kill your marketing but if you want your marketing to generate consistent, profitable clients or customers, whatever you call them, you need to avoid *all* of these mistakes. By focusing on avoiding marketing mistakes, you will automatically become more successful and *profitable* with your marketing.

In the last three chapters I will give you an inside look at the marketing programs for three of our current clients we are actively working with right now so you can see how the

principles discussed in the first nine chapters are being applied to real-world marketing *right now*, as you are reading this.

## **Joe Prospect**



**GET YOUR STRATEGY RIGHT FIRST: Avoid these BIG strategic mistakes – they will sink your marketing and your business into red ink.**

**Chapter 1: DON'T Look at Your Marketing as a Bunch of Activities and Programs- Not a System**

**Chapter 2: DON'T Jump from One Marketing Strategy to the Next Every 30-90 Days**

*Our client was the fastest growing, most profitable single-office insurance broker in Georgia and probably the entire US, because they had a long-term marketing strategy that mirrored Warren Buffet's long-term investment strategy.*

**Chapter 3: DON'T Price Too Low, Sell Too Little, See Too Little**

*Why one of our HP reseller clients grew 10 times faster than any of the other 50 or so technology resellers we worked with.*

**AVOID THE WRONG TACTICS: These BIG tactical marketing mistakes will lead to mediocre profits from your marketing or NO PROFIT.**

**Chapter 4: DON'T Look Like the Rest of Your Herd**

*Why flipping the word 'Traditional' on its head in our marketing messaging, helped us generate over 2,300 clients for our high-ticket B2B consulting service.*

**Chapter 5: DON'T Answer Too Many Questions and Fail to Answer the Critical Questions**

*How we increased the number of meetings booked by 500%, on a twenty-city marketing campaign for our national printer/copier*

*company client, by recalibrating our messaging using the Prospect Response Calculator.*

### **Chapter 6: DON'T Bury Your Evidence**

*Learn from the Landing Page that generated most of our 2,300 clients.*

### **Chapter 7: DON'T Make it All About You**

*Our client invited 800 senior executives and CEOs of multi-national manufacturers to their peer roundtable events and got 503 registrations and 115 attendees by making it all about THEM!*

### **Chapter 8: DON'T Stay Stuck in Your Own Marketing Silo**

*Trying a New Strategy "The Appointment Solidification Step," reduced online meeting no-shows by 30%, increased the closing ratio by 50%, and catapulted our client to become the #1 Golf Club Membership consultant in the US.*

### **Chapter 9: DON'T Ignore the Cracks in your MARKETING & SALES OPERATING SYSTEM**

**REAL LIVE EXAMPLES OF THE MARKETING & SALES OPERATING SYSTEM BEING APPLIED RIGHT NOW!**

**Chapter 10: Design/Build Custom Industrial Ventilation Systems**

**Chapter 11: User Experience Consultant to SaaS companies**

**Chapter 12: Outsourced Working Drawing Service for Architects**

## CHAPTER 1

### **Joe's BIG Marketing Strategy Mistake #1: Looking at Your Marketing as a Series of Programs and Activities – Not a System**

The most important thing in this book is the opportunity you get to go up to 10,000 feet and observe how your business looks when you compare it with 2,300 other businesses that we have worked with on their marketing. We've had a lot of well-known brands as clients, but most of our clients are small and medium-sized companies across all industry sectors. Amongst those 2,300 clients, we have undoubtedly worked with many businesses just like *your* business.

The key observation that I have made after having observed the marketing of that many companies up close, the strongest businesses that grow the fastest have systems for everything in their business including marketing and sales. And their systems integrate together seamlessly. On the other hand, smaller businesses that are struggling to grow, are usually run haphazardly rather than systematically. They're missing key systems and the systems they do have don't integrate well together. Your business, our business, anybody's business - is the sum total of all of the systems that make up that business, and how efficient those systems are. The struggle to grow a business is really the struggle to create the missing systems in the business and improve the systems that are weak or inefficient.

## A Business is the Sum Total of its Systems

- The strongest businesses that grow the fastest have systems for everything.
- Their systems integrate together seamlessly.
- Smaller businesses that are struggling to grow are run haphazardly rather than systematically.



It is not just important to have systems in your business. System integration is key. It is critical that all of the systems in a business work smoothly together, so that the business feels like it's being run *systematically*. One of the central ideas in this book is that the systems in your marketing & sales process, have to fit your *people* system - the people on your team. The systems include both technology systems and people systems and the people and the technology have to work together.

A systematic business doesn't feel like you're *lurching* from one crisis task to the next. It feels like everything is flowing smoothly and efficiently for the people involved in the business. If that situation of lurching from one task to the next describes the way you feel about your business and your marketing, then I think you will find quite a bit in this book that will be very helpful.

What are the core benefits of a business that is run systematically? It is a less stressful work environment for everyone involved with the business - management, employees, vendors, everybody knows what to expect. You know how things are done and you know what the outcome is going to be. The

business grows faster and makes more profit than a business that is run unsystematically.

And here's a key one if you own the business: The *value* of the business is significantly greater because the business is much more appealing to a new owner because it looks easier to run. If you want to buy a business and you look at that business and it's got all these finely tuned systems, you're not going to worry about the fact that the owner is no longer going to be there, because the systems will just take over. And particularly on the marketing and sales side, because if you can see they've got systems that are growing the business and everything is running smoothly, that is going to continue whether the owner is there or not. So, that business becomes a lot more valuable to buy.

If your business isn't growing at the pace that you'd like it to, then that's probably the reason - you don't have good marketing and sales systems in place.

**According to Joe, what are three essential questions that you need to ask yourself in order to accelerate your sales and grow your business?**

1. Which systems do we NOT have in place at the level that they need to be at, to grow the business?
2. What systems do we need to work on first?
3. How do we go about creating the systems that we're missing and improving our current systems?

What is the most efficient way to tackle the problem of improving your systems and growing your business? You should look for a partner with the knowledge and experience to help you systematize your business. (**Hint:** His first name is Joe.) Then figure out which systems are most critical to the growth of your business and get to work on them.

What is the most essential component for marketing and sales success? Who's making the marketing decisions in your business? A successful marketing and sales effort requires someone who is knowledgeable about the entire marketing and sales funnel sequence. Someone to develop the strategy and manage the overall process. Someone to direct the orchestra.



Marketing and sales are often approached on a piecemeal basis. You do a little bit here, and a little bit there. Everything stops when you've got too much business and then there is a mad scramble to try to figure out what to do to get more clients when things slow down. And it is very difficult because if you don't have a pattern or a system of how you do things, you're

stuck trying to figure out, “well, which direction do we take next?” You have so much conflicting information and advice as to what to do. Marketing decisions in a situation like that are made based on *gut feel* instead of hard data because there’s not a complete understanding or the ability to *measure* the critical steps in the marketing and sales process. And this results in *slow* or *no growth* for the business.



Every business ideally needs a Chief Marketing Officer, a CMO. But most businesses can’t afford one. Typically, a Chief Marketing Officer works in a big business with a big budget. And so, it’s not only the fact that typically a small or medium sized business can’t afford a CMO, a CMO probably wouldn’t be appropriate for a SMB because they’re used to working with a big budget and a big staff. They use a lot of outsourced vendors that do everything for them. And that’s not the way most businesses can afford to operate. You need somebody with experience and knowledge about the entire marketing and sales process, and ideally, they should be familiar with a wide range of companies across multiple industries.

Where do you find somebody like *that*?

Well, here I am, **Joe Prospect** at your service! **Joe Prospect** is the quintessential *Everyman* prospect. Who better to direct your marketing orchestra and guide you out of the marketing wilderness than me – *your prospect and everyone else’s prospect*! In this book, I will act as your Fractional CMO. In fact, I will go well beyond acting as your Fractional CMO. I will become your *Fractional Marketing & Sales Engineer* and help you design a *Marketing & Sales Operating System (MS-OS)* for your business.

Your MS-OS will be fully customizable and capable of adapting to the idiosyncrasies of your business, your resources, your strengths and weaknesses, and the strengths and weaknesses of your team.

If the MS-OS sounds complicated it isn’t. Basically, all it does is create a marketing and sales *process* that fits your team and your budget, then it tracks everything in the process to make sure nothing falls through the cracks to stop sales from coming out the other end. The MS-OS does everything necessary to automate and support all of the people in the process. The MS-OS is designed for you and your team, and it adapts to you and your team—you don’t have to adapt to the system.

The information in this book will allow you to see holes in your marketing and sales process that are so big and so obvious, you could drive a truck through them. You will be able to design a Marketing & Sales Operating System for your business that will plug up those big holes *and* all of the smaller holes as well.



The chapters in this book focus on the big holes – the dumb mistakes that you may be making in your marketing. Once you understand the areas where you and your team are making mistakes in your marketing and sales process, you will be able to design a *profitable* MS-OS for your business.

## CHAPTER 2

### **Joe's BIG Marketing Strategy Mistake #2: Jumping from One Marketing Strategy to the Next Every 30-90 Days**

Almost all of the [2,300+ clients](#) we have worked with on their marketing had one finger on the eject button when they were trying out their marketing campaign with us – *except the most experienced, fastest growing, most profitable clients*. They had a long-term approach to marketing.



Once they had decided to work with us, the minimum amount of time they planned to run their campaign was six months. Most of our agencies did not have a minimum term on our agreement. It was generally month to month. These clients set their own minimum six-month term. They carefully planned and allocated budget to run the campaign for at least six months

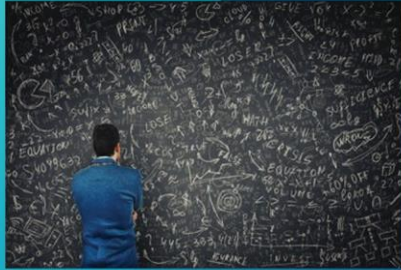
in order to determine if we were the right long-term marketing partner for them.

It is natural to want to avoid risk and not want to end up feeling dumb when you are spending money on your business, particularly when it comes to marketing. Every business that has tried outsourcing some or all of their marketing, knows what it is like to feel that you have been duped by the latest marketing guru who makes promises and then doesn't deliver.

Has your company had a similar experience or many experiences like that? The reality is that the problem quite possibly wasn't the marketing company. It may have been that you didn't stick with the program long enough or budget appropriately to stay with the program and follow through on all of the essential components of the program.

Are you constantly questioning which direction you should be going with your marketing? If you are always looking for the next marketing miracle program and you always have one finger on the eject button from the day you start the marketing program, how likely is it that it will succeed? You need to take a longer-term view of marketing in order to make your marketing work. You can't keep jumping all over the place if you want your marketing to succeed.

## Where do I go next with my marketing?



We have worked with hundreds of companies in every industry sector, and we have had the opportunity to observe and compare their approaches to marketing, *and the level of success they achieved.*

The clients that were the most successful with their marketing (*even before they started working with us*), generally did not have a better mousetrap than their competitors or better marketing. They just planned their marketing. They had a system, and they implemented their marketing and sales system more consistently than their competitors.

### **Joe's Sales/Profit Acceleration Tip**

*All marketing works - it just has to be done consistently.*

One dramatic illustration of this is an insurance firm in Georgia that one of our agencies worked with for several years. Before they started working with us, they were already the largest, fastest-growing insurance broker in Georgia and had been for many years. They had developed a very efficient outbound marketing strategy that combined e-mail, direct mail, and outbound calling. They had an internal team that called every company in Georgia with 20-200 employees every year to verify who the key decision maker was and find out the renewal date of their group health plan. They then mailed a professional package and made follow-up calls 90-120 days before the renewal date to set appointments for their sales team. So, what was their secret marketing sauce that enabled them to leave their competitors in the dust?

They did the same thing ***consistently*** every year.

The most important thing they did when they made those calls was to keep notes on who they spoke to and what the insurance situation with the prospect company was. That way when they called them the next time, they could refer to their notes and it wasn't a cold call. It was like old home week, "Hi Becky, we spoke last July and you said... , how are you?"

They hired our company to handle all of the outbound calling and e-mailing but they made sure we stuck *precisely* to their system. We were more efficient at hiring and training outbound callers and designing e-mails, so we were able to increase their productivity by 64% and lower their cost by almost 50%, but we can't take credit for the system.

We had worked with at least 20 other insurance brokers before they selected our company over 16 other marketing companies.

We obviously had a pretty good track record with insurance brokers, and we understood how their business worked. They couldn't alter their fees because their commissions were set by the insurance carriers. They all said that they had relationships with the best insurance carriers, and they all said they would deliver better service and that was pretty much the only points of differentiation for all of them.

The only way they could *truly* differentiate themselves to their prospects, was by being more consistent with their marketing and continuing to market to the same prospects year after year.

The same story repeated itself hundreds of times out of the more than 2,300 companies we have worked with. Consistent marketing programs staying in front of the same prospects consistently over a long period of time (*ideally forever*), work. It doesn't matter what combination of marketing programs you are doing, telemarketing, e-mail, direct mail, SEO, AdWords, LinkedIn, Facebook, etc.

For many of our clients though, they had to have a win fairly early in the game, to give them the confidence to keep their marketing program going for several months or years. We probably worked with over 50 insurance brokers amongst our 2,300 clients. We gave all of them the facts about how our insurance broker client in Georgia had become the fastest-growing single-office insurance broker, not only in Georgia but probably the entire US. They all listened and said that they wanted the same strategy, and they were willing to stick with it. Several of them did, however many of them became impatient and quit the program if it didn't produce immediate clients. That is not the way marketing works, unfortunately.

No matter how much crystal-clear evidence we showed them from several of our clients in their own industry and other industries that consistent marketing pays off, many of our clients still had one finger on the eject button. You don't want to make that mistake EVER AGAIN!

You can think about marketing like earning travel points on your credit card. Every transaction earns you points and eventually you build up enough points to get a free trip or flight. But if you see another travel card that looks really great (*the travel card of the month*) and you jump over to that travel card, you lose all the points you have built up on your other card.

Similarly with marketing, every message or touch is earning points with your prospects. You will eventually score enough points with some of your prospects so that you get a meeting with them, or you get them to call you and some of those meetings and calls will turn into sales.

But if you listen to the latest marketing guru, abandon your current strategy and list, and try a new one (sound familiar?), the points you have already scored with your prospects become worthless. You have not scored enough points with them to get them over the meeting or buying threshold. You foolishly abandoned them too soon and moved on to another marketing strategy with another marketing guru.

“Whenever I’m interested in something, I know the timing’s off, because I’m always interested in the right thing at the wrong time. I should just be getting interested after I’m not interested any more.”

— Andy Warhol

You need to market consistently to the same group of prospects using the same strategy, for months and years to capture your full share of the market.

And there is an even more critical reason to market consistently to the same prospect list. Even if your marketing isn't spectacularly interesting, at least you are staying in front of your prospects, so you will be in front of them when the timing for your product or service is right for them.

**Two of Joe's Sales/Profit  
Acceleration Tips**

1. Every marketing touch scores points and moves your prospect closer to the point where you have scored enough points to get them over the buying threshold.
2. Your prospects can't buy from you if you aren't right in front of their nose when they're ready to buy.

To understand the value of a long-term approach to marketing, a good analogy is to compare successful marketing to the way that Warren Buffet invests successfully. Warren carefully researches the companies that he invests in and then he holds onto their stock for the long term. He doesn't get distracted by all of the investment gurus and jump around to every new stock of the month.



Warren sees the long-term value of the companies he invests in and he sticks with them. Successful marketing is about seeing the long-term value of your prospects and *sticking with them* until you score enough points to get them over the buying threshold.

## Market Like Warren Buffet Invests

### Warren Buffet's Philosophy of Investing



- Have a System
- Be Disciplined and Stick to Your System
- Be Patient and Think about the Long-Term Value of a Company
- Don't Be Distracted by the Noise Around You, Just Stick to Your System

### Will a Patient Consistent Warren Buffet Style Marketing Strategy Grow Your Sales?

- If you have the right system
- If you are disciplined and patient like Warren
- If you believe in the long-term value of your prospects like Warren believes in the long-term value of the companies he invests in
- If you don't allow yourself to be distracted and blown off course by every 30-day marketing miracle that comes along

## CHAPTER 3

### **Joe's BIG Marketing Strategy Mistakes #3, 3a and 3b: Pricing Too Little, Selling Too Little, Seeing Too Little**

Have you tried marketing programs unsuccessfully several times and you keep jumping into yet another and another marketing program because the numbers just never work to make the marketing profitable for your company?

Your problem likely isn't the marketing programs.

You need to look at three things - your price, the lifetime value of your customer, and your *perception* of the lifetime value of your customer. Those three things are inextricably intertwined when it comes to marketing profitably, growing your sales and making your business more profitable and valuable.

In this chapter, we will focus on the financial realities of marketing and how your price and lifetime customer value, are two essential lynchpins to make your marketing profitable.

**According to Joe: Two critical questions you need to answer in order to accelerate your sales and profit:**

A: What is your *exact* cost per customer acquisition for each marketing program?

B: What is your lifetime profit per customer and how can you increase it?

In order to make a profit from your marketing, you have to make sure that B is greater than A - *significantly* greater!

***Price:***

Many companies that decide to stick their toe in the marketing bucket for the first time and start spending money on marketing, are doomed to failure from the start. They may have been relying almost exclusively on referrals and networking to generate new customers and their pricing reflects that. They haven't had to spend money on marketing other than to create a website and update it now and then.

There are two critical problems with low pricing. It positions your company in the eyes of your prospects as one of the '*herd*' of <*your type of business*>, and it doesn't allow you to spend money to acquire new customers and have the patience to let your marketing programs run long enough to produce results.

Later in the book we'll look at positioning and the multiple dangers of looking like the rest of your herd. Even if you can't

control your price or fee, positioning your company outside of your herd is crucial to your marketing success.

All marketing works and there are plenty of different marketing programs that will work for your business.

The easiest way to guarantee that you will make a profit from your marketing, *even if you have average marketing*, is to increase your fee or price and/or increase your lifetime customer value.

If you are in a business where you don't get to set your prices, like the insurance business, you still need to pay attention to your average cost to acquire each customer and the average lifetime value of each customer.

Let's look at the easiest ways you can increase your price or fee.

To increase your price, you may not need to do anything other than research the prices your competitors are charging and realize that your prices are too low.

It is better to also increase the *perceived value* of your product or service when you increase your price.

The good news is that you automatically increase the perceived value of your product or service when you increase your price or fee. We assume that the highest priced product is better than the lower priced product in the same category. That may not always be correct, in fact it is probably wrong a lot of the time, but that is the way we think.

If you are going to increase the perceived value of your product or service in order to justify your higher price, you need to think about your product packaging. The look of your website and the quality of your marketing materials has to *'fit'* your price.

The other way to sell a higher price is to have strong evidence that your price is justified, proof that your customers get a great return on their investment.

In a later chapter, we will look at how you can easily create the precise proof you need to justify your price by interviewing your customers. You'll also learn how not to bury your evidence by putting up a bunch of fluff testimonials. You need to give your prospects *only* the key information they want to see in your testimonials.

Here are some examples of how we justified our higher fees. These are excerpts from interviews we did with our customers where *our customers* justified our fee in their own words.

**What was your overall return on investment for your campaign?**

*"The lifetime value of each client is \$72,000 so we generated \$504,000 from our campaign."*

**How many new clients and how much revenue have you obtained from your campaign?**

*"The campaign netted us 100 new clients representing \$2,000,000 per year in recurring annual revenue."*

Even if what you are selling doesn't easily translate to a measurable return on investment, you can still prove to your prospects that they will get their money's worth from your product or service.

### **Why did you stick with our company all these years?**

*“The reason I stuck with PPS is because you guys have fundamentally changed my business in a lot of different ways. The technology insights that you've brought to me and the quality of the PPS people on a daily basis.”*

### **Lifetime Customer Value**

Even if you can't raise your price or fee, you may not have to. For profitable marketing, your price is tied in with the lifetime value of your customer. Even if you can't increase your price, you may be able to increase the lifetime value of your customer. Or ideally, you may be able to do *both*.

Here is an example that illustrates why it is so important to focus on the lifetime value of your customer if you want to jump ahead of your competitors on the profitability scale.

One of our agencies provided marketing programs for resellers for several large technology companies like HP, Xerox, and Cisco. The head office would fund the marketing programs for their resellers. We worked with at least fifty different resellers of technology services, printers, copiers, and telephony.

Most of these resellers ranged from \$1,000,000 to \$5,000,000 in annual sales. At one point, we were referred by HP to work

with one of their resellers that had grown their business to \$80 million in a little over ten years. That was more than *ten times* the annual sales of any other HP reseller we had encountered in the twenty or so resellers HP had contracted us to work with.

Why did this one reseller grow *ten times faster* than the other resellers?

By focusing on *Lifetime Customer Value*.

In addition to selling copiers, printers and technology products from HP and other companies, they sold anything else they could think of that would increase the lifetime value of their customer.

They sold office products and supplies which is a great recurring revenue service. They sold Janitorial Services and IT security services and by now they have probably added five other products or services.

You might be saying to yourself, “We don’t want to have to get into five other businesses, we have enough trouble managing one business.”

Your company doesn’t have to provide each product or service. You can resell or refer someone else’s product or service. This HP reseller simply found partner companies that could deliver those additional products and services at a high level and in some cases they white labelled them.

Even if you are a one-person company, you can still partner with other companies to resell or refer their services, for a commission of course.

A client or customer is too expensive and too difficult to acquire, not to ensure that you generate as much profit from them as you can. If you observe what has been going on in business around you, that is how all the fastest growing *most profitable* companies do it.

The other advantage of striking these types of partnerships is that your partners will reciprocate by selling your product or service or referring business to you for a commission.

**Joe's Sales/Profit Acceleration Tip  
Increasing Lifetime Customer Value =  
More Profit**

Increasing your price isn't the only way to make your marketing more profitable. You can also increase the lifetime value of your customer by selling more of your products or services to them or reselling or referring other products or services to your customers.

***Perceived Lifetime Customer Value:***

Lifetime customer value is very important to think about if you want profitable marketing, but it's tricky. You can't just think about increasing the lifetime value of your customer. It may be just as critical that you increase how much you *think*



your customer is worth – your *perception* of the lifetime value of your customer.

If you are calculating the return on your marketing investment after only 30 to 90 days, it is very unlikely that it will be profitable. Depending on what business you are in, you may have to stretch your timeline out considerably to see the point at which your customer starts to earn a profit for your business.

The insurance broker we talked about in the previous chapter is an example of how a longer-term view of the lifetime value of your customer may be all you need to out-market and out-sell your competitors. They marketed to the same prospects year after year because they understood they were scoring points each year and slowly moving closer to acquiring them as a client. And because they were selling a recurring revenue service, they could afford to spend several years to acquire the client because they knew the client would likely be retained for several years.

They couldn't charge more for their service because their commission rate was set by the insurance carriers. Their clients weren't actually worth more than the clients of their competitors because the clients usually stuck with one insurance broker for several years. It was their *perception* of how valuable their clients were and how they should approach their marketing, that allowed them to dominate the insurance industry in their state by marketing consistently year after year to the same prospects.

This example illustrates the point that the further out you project your customer value, the more profitable your marketing will be. On the 2<sup>nd</sup> and 3<sup>rd</sup> rows of the table below, you can also see how incremental improvements in your number of sales

presentations and your closing percentage, increase lifetime customer value.

Here is something critical that you need to be aware of. Your cost to acquire each new client must be absorbed from your Year 1 revenue for that client (or beyond year 1). From that point forward, you will be earning a profit from each client, *as long as you are able to retain your client*. In the example below, the average annual profit per client is \$9,000 and they are retaining 90% of their clients into Year 2 and 80% into Year 3.

Total	Sales Pres.	Closing	Cost Per	New Clients	Year 1	90% Retention Year 2	80% Retention Year 3
Mthly Fee	per / month	%	New Client	per 12 months	Net Profit	Net Profit	Net Profit
\$3,000.00	5	10.0%	\$6,000.00	6.0	\$18,000.00	\$48,600.00	\$38,880.00
\$3,000.00	7	12.0%	\$3,571.43	10.1	\$64,800.00	\$81,648.00	\$65,318.40
\$3,000.00	10	15.0%	\$2,000.00	18.0	\$144,000.00	\$145,800.00	\$116,640.00

### **Joe's Sales/Profit Acceleration Tip**

Increasing your *Perceived* Lifetime Customer Value (how much you *think* each new client is worth) will stop you from jumping to a new marketing program every 30-90 days and allow you to stay calm and carry on with your marketing to the point where it is profitable.

## CHAPTER 4

# Joe's Tactical Marketing Mistake #1: Looking Like the Rest of Your Herd

Let's consider what happens when a prospect looks at a marketing message. You are a prospect and you have been inundated with *a lot* of marketing messages, so you can decide if this makes sense.

Prospects need to make hundreds of decisions every day whether to pay attention to marketing. Marketing comes at us in a steady stream on radio, television, e-mail, text and online. Because we have so many marketing messages to decide about every day, we can't afford to allocate very much time to each message.

There is a theory about what is happening inside our brains when we look at a marketing message.

The idea that prospects '*position*' every product or service in their minds was introduced by two brilliant advertising guys, Al Ries and Jack Trout, in their book 'Positioning The Battle for Your Mind.'

Here is what '*theoretically*' is going on. We all have a filing cabinet in our brains that contains a file or '*position*' for every type of product and service we have ever encountered and the sellers of those products and services.

When we see an ad or e-mail or any type of marketing message, we automatically try to classify that product or service in our mental filing cabinet. We decide what type of product file it belongs in, and we have subclassifications to break all products and services down into even finer categories. Let's take marketing for example. If you are involved in any type of business, you get *a lot* of marketing messages trying to sell you some kind of marketing.

In the marketing folder in the filing cabinet in your brain, you have many different sub files. You have the e-mail marketing guy file, the SEO marketing guy file, the Facebook marketing gal file, the LinkedIn marketing gal file and many, many other marketing guy or gal categories in your marketing file. Within each sub-category of marketing, you have further classifications. You have the credible e-mail guy file, the spammy e-mail gal file, the new and interesting e-mail gal file, etc.

You go through this classification and sub-classification process in milliseconds for every marketing message that comes into your sphere of consciousness. Almost all marketing ends up in one of our bad sub files where it means we will never pay any attention to a marketing message from that company again. We have already classified them as not credible or not worth our time. They will languish forever in the deep dark recesses of that marketing filing cabinet in our brains.

Which brings us to the *horrible* danger of looking like the rest of your herd.

You can probably guess where this is going. If you know that your prospect has a file in their brain for your herd (*all the*

*companies in your business category*), the last thing you want to do is look like the rest of your herd and get *buried* forever in that herd file.

*“If you’ve seen one of us,  
you’ve seen all of us.”*



The good news is that the folder in your prospect’s brain for your herd, has sub-files where your prospect breaks down the finer points about members of your herd. You can’t hide the fact that you are a cow, but you can show your prospect that you are a very unique and *special* kind of cow!



You want to be focused in your marketing on making yourself look *very* different than the rest of your herd!

How do you do that? Testimonials, awards, We’re the best < >, We’re the top < >.

Pretty weak marketing if that’s all you have, and your prospects won’t buy it (*literally*). Despite your best effort, you will end up right back in the same file as the rest of your herd.

I’ll share a one-line headline (*or positioning statement*) that you might be able to use to keep you out of the herd file forever.

We sent three e-mails a week to a list of 100,000 prospects so we had plenty of opportunity to test different subject lines. The best one was “Traditional Marketing Doesn’t Work Any More”.

That also became the headline on the main page of our website and some of most successful AdWords ads and landing pages.

That one line did two things for us. It dumped all of our competitors into the ‘Traditional Marketing File,’ and it created some big *troubling* unanswered questions in the minds of our prospects.

What *is* traditional marketing? *Am I doing traditional marketing?*



By creating big unanswered questions, we made our prospect uncomfortable. They wanted to be able to classify us in their marketing filing cabinet quickly and move on, but they couldn't.

What's going on there?

Prospects are curious, and they don't want to miss out on anything.

I learned about this theory in one of my psychology classes. It's called the 'orienting response.' All organisms (*including human organisms apparently*) are programmed to seek out new information. That's how we learn about our environment and survive. In the next chapter, you'll see how *Curiosity* plays a huge role in something I call the ***Prospect Response Calculator***.

Does this re-positioning strategy work? Our AdWords campaigns always had the highest click-through and conversion rates in our category, using the 'Traditional Marketing Doesn't Work Any More' positioning statement and we were often competing against the very deep advertising pockets of bemoths like Google and Salesforce.com in the same keyword categories.

You can apply this to your marketing by creating a positioning statement for your website, e-mails, and landing pages that dumps (*positions*) all of your competitors in with the rest of the herd and positions your company outside of the herd. There are a lot more sales *outside of the herd!*

**Here are examples of positioning statements that will move your business outside your herd:**

Traditional, Conventional, <*Your Service*> Doesn't < Cut it, Perform, Stand Out> Any More

The Traditional IT Model Doesn't Work Any More

The Traditional Accounting Model Doesn't Let You See Your Numbers When You Need Them



## The Traditional Business Coaching Model Doesn't Work for Women Owned Businesses

## The Traditional Six Sigma Process Doesn't Work Any More for Manufacturers

### **Joe's Sales/Profit *Acceleration* Tip**

Your ideal marketing '*position*' should create this question in the mind of your prospect:

*"I wonder if I'm missing out on something here?"*

## CHAPTER 5

### Joe's Tactical Marketing Mistake #2: Finding Other Ways to Get Dumped into the 'Seen That Done That' File

The way that your prospect *'positions'*, or categorizes you, within your herd, has a few more layers. Here is a simple way to make your marketing work better by trying to understand those layers. Look at marketing through the eyes of your prospect. Let's call him Joe Prospect. LOL!



Every time we put a marketing message in front of him, Joe asks himself a series of questions to decide if he wants to take the next step.

- Q1.** Do I need this?
- Q2.** How soon do I need it?
- Q3.** Can I trust these guys?
- Q4.** Have I seen this before or tried something like this already?
- Q5.** How excited am I about taking the next step?

Joe asks himself the same questions regardless of whether that next step is opening your e-mail, clicking on your website

link in your e-mail, booking a demo, or signing up for your newsletter. Let's look inside Joe's brain as he asks himself these five questions and decides if he is going to take the next step we want him to take. He assigns a score to our marketing message on each of these questions, and then he tallies up whether he should take the next step – the *ACTION*.

Joe Prospect's Marketing Response Calculator					
Q1: NEED	Q2: TIMING	Q3: TRUST	Q4: CURIOSITY	Q5: EMOTION	ACTION
1	1	1	1	1	1
2	2	2	2	2	2
3	3	3	3	3	3
4	4	4	4	4	4
5	5	5	5	5	5

Joe's marketing response calculator is *always* operating. You are *always* bargaining with Joe for his time and attention to your marketing message, whatever form that takes. It never ends.

The real challenge in marketing is Question #4; 'Have I seen this before or tried something like this already?' Because Joe is so overwhelmed with marketing messages coming at him, in order to keep his brain from blowing up, he has to quickly check the filing cabinet in his head to see if your type of company or your type of product or service is already in there, or if the information you are sending him is already in your category folder in his filing cabinet. If it is already in his filing cabinet, it is very likely that he will ignore the message. He has concluded that he has '*seen that done that*' already. He has already seen

everything your *herd* has to offer. There is nothing *new* for him here.

That is why it is so critical to position your marketing message in such a way that you make it difficult for your prospect to easily categorize you in their '*seen that done that*' file with the rest of your *herd*. Every time you reach out to Joe with your marketing message, you need to remember that he is ready to dump you into that '*Seen That Done That*' file. *Every time!* You can *never* relax. You can't just toss more marketing out there because your prospect will just toss it in their '*Seen That Done That*' file.



Fortunately, Joe is a very curious being. His brain is wired to look for new information in marketing. Joe is also an *emotional* being. His brain is wired to take action when he gets *excited* about *new* marketing information that he can *trust*.

That is your edge when you are marketing to Joe. You now understand him, so you can design your marketing to work *with* him - not *against* him.



All you need to do to make your marketing more effective, is to inject more *Curiosity, Trust* and *Emotion* into it, to counteract your prospect's tendency to dump all marketing into the 'Seen That Done That' file.

This may seem overly simplistic, but it works. Just make sure your prospect doesn't dump your marketing message in the 'Seen That Done That' file.

Here is an example of two marketing messages we used for one of our clients who was selling AdWords programs to universities and colleges. The first message did not work very well. The second message worked extremely well. Let's look at why.

The successful message made sure the prospect got all the right information to answer enough questions to spark their interest, but not enough information to conclude that they had already 'seen that done that'. The two messages were identical except for the part highlighted in yellow.

### **E-mail/Calling Campaign for AdWords Consultant to Universities & Colleges**

#### **Unsuccessful Marketing Message**

We have a **very unique AdWords marketing strategy that** has been incredibly successful in helping other schools like <name *some of their current school clients*> to attract new students. Unlike most online programs to attract students, it generates student inquiries for your school exclusively. Would you like to get more information on the program?

## Successful Marketing Message (Same Campaign)

We have a **very unique online marketing strategy** that has been incredibly successful in helping other schools like <name *some of their current school clients*> to attract new students. Unlike most online programs to recruit students, it generates student enquiries for your school exclusively. Would you like to get more information on the program?

Why did the second message generate a more positive response from the prospect?

Remember the prospect is always assessing every marketing message to see if it has new information. Both messages answered all the right questions, (Need, Timing, Trust) but the first message also answered a question it *shouldn't* answer. *'Have I seen this or done this already?'* it talks about an AdWords program and every school already has an AdWords program they are running themselves or they have a marketing company doing their AdWords program. *Seen that done that, No curiosity - No action.*

The successful message talked about a **'unique online marketing strategy'**. The prospect did not have a file for that in their filing cabinet so they could not comfortably conclude that they had already *'seen that done that'* and ignore it.

Below is another example from a campaign we conducted in 20 cities for a national printer/copier company.

## E-mail/Calling Campaign for National Copier/Printer Company:

### *Unsuccessful Message that got poor results:*

Hello <First Name>  
<Company> would like to schedule a meeting with you to discuss how <Company's> new generation of multi-function printers and copiers can help you reduce costs and solve common business challenges related to document imaging.

### *Successful Message that got 300% more meetings:*

Hello <First Name>  
<Company> would like to schedule a meeting with you to show you our really innovative new technology. Our new technology is **REALLY AMAZING** and will help you reduce costs **IMMEDIATELY**. We'd like to have one of our consultants pop in for a few minutes and give you an information package.

In the first message, the prospect heard that it was about multi-function copiers and printers and thought, “*I’ve seen that, done that* already and our printer/copier contract isn’t up for 18 months. These guys are just another one of that *herd* of copier and printer companies that will call us 463 times over the next 18 months anyway. Nah!”

In the second message, we didn’t allow the prospect to dump us into the Copier/Printer Company herd file in his brain. We just said it was ‘really innovative new technology’ and we injected emotion into the message by saying it was **REALLY AMAZING** technology. And that it would save them money

***IMMEDIATELY.*** We also reduced the perceived pain of the meeting by saying the rep would just *pop in* for a few minutes.

Because this was a national company with a good reputation, the first message was getting some meetings, but the second message got **300%** more meetings because it didn't get dumped into the prospect's '*seen that done that file*' and it injected more *Curiosity* and *Emotion* into the message.

### **LinkedIn/E-mail Campaign for Coding Outsourcing Company**

Here is a successful e-mail message we used in a campaign for a UK client who was entering the US market and reaching out to CTOs at large US companies to sell their software coding outsourcing service. We also used virtually the same message successfully on LinkedIn.

“I am reaching out to you as my company has had pretty good success implementing our **new IT solutions** with companies like Siemens, BBC and Bang & Olufsen - lowering their project costs by 40% with significant productivity gains.

Your organization appears to be very similar to some of the clients we have worked with. It would definitely be of value for us to chat briefly and see if there are any areas that we can help you with.”

This message avoided getting dumped into the '*seen that done that file*' by not saying *what* the IT solution was, simply saying it was a *new* IT solution. The prospect could not comfortably conclude that they had '*seen that done that*'. If the message had



used *'outsourced coding'* instead of *'new IT solutions'* it would not have worked nearly as well because the prospect has a pre-existing file in their brain for outsourced coding. By also naming some well-known companies they had lowered costs by 40%, with significant productivity gains, it injected *Curiosity*, *Trust*, and *Emotion* into the message.

It may occur to you as you look at this message how short it is. That is by design. The more information we provide the prospect in the initial message, the more likely it is that they will decide they have *'seen that done that'* and that will be the end of it. They will ignore the message and happily move on with the rest of their day.

Here is an example of an extremely short initial e-mail message that worked extraordinarily well for a client who was a membership recruiting consultant to private golf clubs. One quote from one of their *very* satisfied golf club clients was the main information that was provided in the e-mail.

*"Through Dan's efforts at our club, we brought in 135 members!"*

This e-mail message generated a strong level of *Trust*, *Curiosity*, and *Emotion*. The quote was attributed directly to the President of a well-known private golf club, so it created *Trust*. The prospect didn't have any idea *how* they got those 135 new members, so it created *Curiosity*. 135 members seem like a *lot* of new members when your own club is struggling to get new members, so it created strong *Emotion*. The prospect couldn't fall back on their *'seen that done that'* response. The only way they were going to find out *how* that club got those new members, was to take the next step to get more information.

In this case, we knew that the prospect would go to our client's website in the e-mail signature, to get more information, so we actually had our client remove quite a bit of information from their website, about the *method* behind their member recruiting system.

That may sound crazy. Why would you *remove* information from your website?

Remember that the prospect does not want to have to take the next step. They wanted to be able to comfortably conclude that they already knew what our client's system was all about, that they had already '*seen it or done it.*' All private golf clubs that were experiencing a drop in membership, had tried internal membership recruiting programs and all of them undoubtedly had been approached by other membership recruiting consultants. By not giving the prospect any information about the method, we were forcing them to take the next step if they wanted to learn *how* those 135 new members were recruited.

Avoid the tendency to throw every feature and benefit into your marketing messages, especially in your initial marketing messages to your prospect. The more information you provide the prospect in your initial marketing message, the more opportunity you are giving them to conclude that you are just one more of your *herd*, and they will dump you into the '*seen that done that*' file. And the information should stick to benefits, so your prospect will have to take the next step to find out how to *get* the benefits.

Should all of your marketing messages be this short? Your initial message should be short if you include the three pillars of

an effective marketing message – *Curiosity, Trust and Emotion*. Once you have gotten your prospect to take that first step and investigate further by clicking on your website or downloading your white paper, then you can use longer marketing e-mails. But *every* e-mail or ad, *has* to include those three pillars – *Curiosity, Trust and Emotion*.

**Joe's Sales/Profit  
Acceleration Tip**

Inject *Curiosity, Trust* and *Emotion* into your marketing to avoid getting dumped into your prospect's '*Seen That, Done That*' file.

**Joe's Sales/Profit  
Acceleration Tip**

Make your initial marketing messages short and stick to benefits only. Your prospect will have to take the next step to find out how to get the benefit.

Always try to put at least one unanswered question in every e-mail to create curiosity and inject something that establishes or reinforces the trust you have already developed with your prospects. And you can never forget about *emotion*. You need to use language and examples that *excite* your prospect, so they take the next step – The *ACTION*.

**What if the action you want your prospect to take is down the road?**

Depending on what you are selling, your prospect may not see immediate value in taking the next step you want them to take in your marketing process, because they won't reap the benefits of your product or service right away or anytime soon.

Let's say you are selling insurance or copiers where there is a fixed term to the contract. Or you are selling marketing or janitorial services or coaching or any type of consulting, where your prospect has agreed to work with one of your competitors for a specific period of time.

You can inject *Curiosity, Trust and Emotion* into your marketing, but what if the need is down the road. From your prospect's perspective, '*down the road*' may be as short as three months or six months. They may feel that they have too much on their plate to bother looking further into what you have to offer right now, no matter how exciting you make it sound.

One obvious thing you can do is to carefully note the date that the agreement or contract is up, and set yourself a task to follow up with your prospect 30 or 60 days in advance. You should also time your follow up e-mails to start stirring up the curiosity, trust and emotion a month before you make your follow up call. That is part of the method that our insurance broker client used so successfully to dominate the health insurance market in Georgia.

But is there anything you can do to inject immediate *Need* into your marketing messaging, even if your prospect's need for your product or service is down the road?

You can change your call to action from a meeting to something that will provide more immediate benefit to your prospect.

One of our very successful campaigns for a health insurance broker in Maryland, involved inviting HR managers to workshops, where they could discuss common issues in

managing employee payroll, health benefits and understanding employment laws. The HR managers loved coming to these workshops where they could interact with their HR counterparts in other companies. The workshop was of immediate interest to the HR managers because it was happening *now*, not six months from now. By organizing and facilitating the workshops, our client was building trust with the HR managers and paving the way for a future meeting to discuss their group health insurance plan.

We also had a lot of success creating information guides or reports for our clients where we provided useful information for their clients on whatever issues or challenge our client's product or service solved.

These guides or reports can be used as '*lead magnets*' on your website or AdWords and Facebook landing pages, and they can also be used in outbound mailing/calling campaigns.

We would e-mail or mail the guide one month before the renewal date on their agreement with the current supplier or vendor, and follow up to book a meeting for our client. The guide can also be delivered as a series of e-mails. The guide is of immediate value to the prospect because it is helping them deal with problems they are currently experiencing, and it also creates *trust* to open the door to a future meeting. We made sure that the guide did not give away all the *features* or method of our client's service, so that we maintained a strong level of *curiosity* and avoided the prospect dumping the information and our client, into their '*Seen That Done That*' file.

It is better to mail or courier your guide or report in addition to sending it by e-mail, so they will keep a physical copy of it on file. Even if it is sitting under a bunch of other papers on their desk, they will remember you when the need for your service comes up.

### **Joe's Sales/Profit Acceleration Tip**

If you are selling something that your prospect isn't going to need right away, scale back your call to action, and offer them something that will be of *immediate* value to them and keep you top of mind and available to them until the timing is right.

Below is a sample of a guide we created for a sales consultant who referred business to collection attorneys. The companies he was marketing to were often under a one - year contract with a collection agency, or they didn't have a current large outstanding invoice, and he needed to be able to provide them with something of immediate value. Something that would keep him in front of them until the timing was right.

## ***What You Need to Know to Collect Large Debts Over \$10,000***

### ***The Standard Way Companies Handle the Collection of Large Past Due Invoices:***

When a company has a past due invoice, generally around 3-6 months outstanding, they try their own internal collection

efforts which means multiple calls, e-mails, letters to the debtor, usually with no result.

After a few frustrating weeks or months of wasted time, the company then decides to turn it over to a collection agency. Most agencies have people who work on the case on a sliding scale. They get paid x-amount of dollars plus they get paid a commission based on how much they collect.

A typical scenario. If a company is owed \$20,000, they enter into a payment plan where the debtor will pay \$100/month. And on this amount the collector will be compensated. However, generally when you get into one of these agreements, by the time the 3rd or the 4th month comes around, the debtor will conveniently forget to make any further payments, thus, you're right back where you started.

***The result - a LOT of wasted time, money and energy and NO result.***

***The Better Way . . .***

We have Attorneys working with us and for us in every jurisdiction throughout the US. When we are contacted by a client, we have someone in the local jurisdiction of the debtor, contacting them, verifying the debt, and then having a very unambiguous conversation with them, "Pay us or we'll sue you on behalf of our client!". Because most people have had some sort of previous experience with an Attorney, they know what they are capable of, and they tend to respond to our request.

If a company owes over \$10,000, typically there are other debts that they've incurred so they've had experience with going the collection agency route and they know that eventually the agency or the company they owe money to, gives up. Conversely, when they are contacted by an Attorney's office, they know that they have to pay or they will be sued. Plus, they will also have to incur the cost of retaining an Attorney to defend an action as well as having to pay the bill.

### ***Why Choose an Attorney over a Collection Agency?***

It's simple - the attorney has greater leverage than the collection agency.

### ***Concerned About Turning a Collection File Over to a Lawyer?***

***Don't be.***

Some companies shy away from working with a Lawyer for debt collection simply because they don't understand the process. They are accustomed to (and trained to) respond the same way day in and day out. Regardless of whether the overdue amount is \$200, \$1,500, or \$50,000, they're used to responding the very same way. Our goal is to educate companies that there is a more expeditious and effective way - and that is to utilize our network of experienced Collection Attorneys.



## ***Other concerns addressed:***

### ***1 - Fees***

Legal fees right out of the gate? NO, there are no legal fees at all! Nothing is due until we collect the money from the debtor. No collection, no fee. We're on the same side as the client because we are very much in favor of getting paid and we'll leave absolutely no stone unturned until the money is collected in full.

### ***2 - Appearance of Being Heavy Handed / Threatening***

Do you fear that you may appear to be too heavy-handed if you use an Attorney, especially if you hope to continue to do business with that customer in the future? Our philosophy is that if you are financing a customer's operation the very best thing that you can do is to refer that customer over to your competitor. Let them finance this operation and let them tiptoe with this guy to bankruptcy court rather than your company.

### ***Sometimes Less is Better, but Not in This Case***

Our network of collection Attorneys is definitely the better way to go over an individual Corporate Lawyer or a local Attorney. For example, if your business operates in Oshkosh, you don't retain Attorneys that have jurisdiction in Provo, Utah, Albuquerque, New Mexico, or Sedona, Arizona, whereas we do.

An Attorney from an outside jurisdiction cannot do the work required of him/her; he/she doesn't know what the laws are and they're not admitted to the Bar in that jurisdiction. The debtor

who owes the money can say, “I dare you, you can’t do anything to me” because they know the law and what is involved and who can do them harm and who cannot. Why? Because this debtor who owes you money has likely been down this road many times before with different companies and outstanding debts.

Only a local Attorney has the jurisdiction and right to file a claim.

### ***Get an Attorney Who Specializes in Collections***

Lawyers specialize in many fields, or some try their hand at many - contract law, copyright law, etc. Our network of Attorneys is dedicated and devoted to one area of law – **COLLECTIONS**, day in and day out. Additionally, due to our vast resource network of Attorneys, most of the time we can source a local collection Attorney who also has expertise in our client’s field of business. Whether the client is involved in trucking, airplane refurbishing or manufacturing, we can find an Attorney who specializes in that area of law and is familiar with that industry.

We draw from several thousand Attorneys across the country and since we have been in business for over 25 years, we generally know which of the (i.e.) ‘five’ Attorneys on a street specialize in collections. We maintain a very close relationship with our Attorneys because we source them regularly.

A specialized collection Attorney with the experience in this field knows what needs be done - what buttons to push - to motivate the clients and the fastest manner in which he can exert legal remedies to motivate the debtor to pay you. Attorneys coming in from other fields might have to experiment and therefore

they do not have the efficiency and effectiveness of specialized Collection Attorneys. Our network of Attorneys have years and years of ‘tried and true’ methods, which they have perfected over many years to get results quickly.

### ***Fee Structure Facts: No Collection No Fee***

Our network of collection Attorneys work on a contingency fee basis - they do not get paid a dime until they receive the collected amount on behalf of the client. Therefore, they are highly motivated to make sure that the client gets paid. In effect, the Attorney’s interest lies in exactly the same place as the client’s which is also why they work pragmatically and effectively. Generally, within one day their office will contact the debtor, inform him that they represent your company, verify the debt and then engage in the conversation, “Pay us or we’ll sue you”. Our Attorney will try to resolve the debt without having to take any legal action, but rather just use their leverage as a local Attorney. Most debtors have been delinquent on previous invoices as well, and they may have had to pay legal fees to defend the action which was brought against them as well as paying the debt. So, they prefer the much easier and more expeditious route of resolving the issue without having to file a claim.

### ***Don’t Wait - Collect your Debts Fast!***

The longer an amount stays outstanding, especially larger amounts, the less likely you are to collect it for many reasons. For example, the debtor company’s circumstances may change, or they may go out of business, or they might cease to do business. Or, sometimes, the company is getting monies in-house and

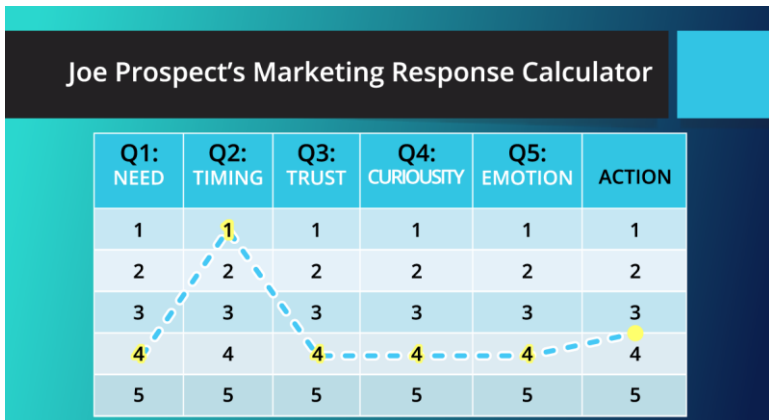
you want to be sure that you're tapping into that from day one and you're not going to wait and stand in line and be number 15.

When your attorney is calling them right from the very early part of the game when everybody else is just writing letters to them, it's going to make a stronger impression on them. Our attorneys will go in quick and get paid while the others may be standing in line to sue the debtor, in which case there may be an action of bankruptcy and they get nothing.

A professional, local, licensed Attorney will follow the laws and expedite the entire collection process.

.....

If we look at this guide through the lens of the Prospect Response Calculator, we can see why it works.



**Need 4:** They can see from reading the guide that it makes a lot more sense to use a lawyer to collect large debts than a collection agency, so they are convinced they do need the service.

**Timing 1:** They may not need the service right away because they don't have a large outstanding invoice.

**Trust 4:** From the well-organized and logical presentation of the information in the guide, they believe that they would be dealing with a professional trustworthy organization if they were to refer an account for collection by a lawyer. Also, they are told in the guide that they won't incur any risk because of the *No Collection No Fee* policy.

**Curiosity 4:** It is likely that the person who reads this guide will have referred large outstanding accounts to collection agencies and they know how the collection agency tries to collect the debt. They will be eager to find out how the process will work if they refer their next large outstanding account to a lawyer.

**Emotion 4:** If someone is reading this guide it is likely because they have had very disappointing results referring their large outstanding accounts to collection agencies. They have very negative feelings about collection agencies. The guide paints a very convincing picture and creates a much more positive *feeling* that a lawyer will get better results.

**Action 3:** To make a sale a series of actions is required. The prospect first has to become aware of the service. They have to come to believe that the service will provide a better result than the service they are currently using. They have to remember the service so that when they do have a need, they will try the

service. They have to take the action of putting the service in their memory bank in a positive light. In this case, the prospect does not need the service now, but the guide has made them take the action of placing it in their memory bank in a very positive light, so they are likely to use it. The guide also gives them something they will likely hang on to, so they remember the service when the timing is right.

## CHAPTER 6

### Joe's Tactical Marketing Mistake # 3: Burying Your Evidence

When you start talking about evidence or proof, you probably automatically think about testimonials.

You have testimonials of course. Everyone has testimonials. *That's the problem!*

*Traditional testimonials don't work (very well).*

They certainly won't sink your marketing like many other things will, but everyone has them, so you are going to look a lot like the rest of your herd by using traditional testimonials.

According to Joe, there are two BIG problems with traditional testimonials.

1. The really strong evidence or proof that instills in your prospects the deep level of belief and trust that it takes to get them over the buying threshold, is usually buried somewhere in the text of the testimonial, *if it is there at all.* In the newspaper business they call it "burying your lead." In marketing, you can think of it as "burying your sale."

2. Your prospects want to know how it *feels* to be your client or customer. Of course, they want to see evidence that your product or service will give them a good return on their investment, but they want to go inside the heads of your clients to see what it is *really* like to be your customer. Your marketing should deliver the facts – the strong proof – with strong *feeling*.

How do you get *really* strong evidence or proof? The kind of proof that will evoke *really* strong emotion and rattle around inside your prospect's brain because it is so *real* to them. You have to get your prospect to *feel* what the experience of becoming your customer is *really* like.

Conduct a five-minute telephone interview your clients or customers and ask them these questions:

**What were the problems you were experiencing before you started working with us?** (The *feelings* of your customer in your marketing message will mirror the way your prospect is currently *feeling* as they struggle with a particular problem and look for a solution)

**Why did you decide to work with us?** (The *feelings* of your customer about your company will reassure your prospect that they are making the right decision to check out your company, and buy from your company)

**What major concerns did you have when you were making the decision?** (This is the most important proof because it instantly



attracts your prospect to your company when they see that your customers were experiencing the *same* feelings and fears that they are currently feeling)

**How did it all work out for you with our service/product?**  
(Your customer is telling your prospect that they too had fears and concerns and everything worked out ok)

**Do you think you have gotten a good return on your investment from our service/product? Why or why not?** (The words and *feelings* of your customer reassure your prospect in their emotional left brain, now their words are providing hard evidence for the practical analytical right side of your prospect's brain)

**What could we do to improve our sales or delivery process?**  
(The ultimate best marketing strategy is to deliver your product or service well, hang onto your customers longer and get more referrals and more strong customer service interviews)

Here is an example of how to use these interviews in your marketing.

It is important that you treat the interview as a customer service interview where you are *genuinely* interested in getting feedback from your client or customer. You will get very valuable feedback and if they happen to say some really great things about your company, you can ask them casually at the end of the interview if you can quote them.

“Thanks, that feedback was really valuable. You also had some very positive comments about us. We are preparing some

marketing collateral. Would you mind if we include some of your comments?”

Why not just ask your clients for a testimonial? Because they won't give you the *right* evidence unless you ask the *right* questions. If you do a short 5-10 minute customer service interview with them over the phone, they will be completely relaxed and speak from the heart. Remember, your prospects are getting bombarded with marketing that is chock full of *weak* testimonials that all sound contrived and scripted. Traditional video testimonials are even worse than text testimonials for seeming contrived. The client on the video often comes off like a very uncomfortable trained testimonial monkey.



If you conduct true customer service interviews with your customers, your testimonials won't feel like testimonials. They will feel *real* to your prospect. The excerpts from those interviews will provide you with the level of proof you *really* need to get your prospects to *really* trust you.

You can use just the right quotes and audio clips from your customer service interviews to make everything in your marketing work better and faster. You will get more leads and appointments and close a higher percentage of sales because your evidence is stronger and more *real*.

It is important that you use the right interview quotes in each area of your marketing and make sure you don't bury them. They are your strongest evidence so you want to make sure you put them where your prospects can't miss them, and you make sure your prospects *feel* them. You want these quotes to be the first thing they notice in your marketing message. Nothing you or the most brilliant copywriters can come up with, will be nearly as powerful as the *feelings* of your customer expressed from the heart.

If you want to see how effective these interviews can be in creating *real* emotionally *jarring* marketing proof that will dump your competitors right back into their herd, look at one of our most successful AdWords landing pages. This landing page and similar ones we used, generated most of our 2,300+ clients.

<https://professionalprospecting.com/LandingPages/MarketingConsultant/>

Let's look at an actual client interview and see how the content of the interview was used to create real, powerful, emotionally impactful marketing collateral. This client builds custom industrial ventilation systems for manufacturing and warehouse facilities.

***How does your relationship with IVS compare to other vendors you have worked with?***

“The equipment that we are building is very new, prototype style equipment and industry changing and therefore very customized. IVS is extremely proactive about letting their customer know about any kind of sudden changes or any questions that they have. They call me with questions as far as dates and times and the validity of certain products and changes. IVS does well at communicating; they are really good about holding a positive relationship with their customers.

And, while most of our products have been produced on time, we sometimes have issues where a product is not accessible in the time frame we need it to be. IVS works with us through those hurdles towards a positive outcome.”

***What could IVS do to streamline the relationship? Do you have any suggestions for them?***

“They are really on the ball with our work, I don’t see much that they could improve on. The team I’m working with are very upfront with sharing dates and through e-mails lots of communication. Personally, I would rather have an overabundance of communication than too little.”

***How has this relationship with IVS impacted your company's bottom line?***

“Early on we tried to strike a good relationship IVS because as the customer we want more bang for our buck . . . I mean what customer doesn't? Then, I imagine from IVS's standpoint, they have to make money as well. I believe that having the good relationship that we do now allows us to kind of have a modicum of both. We, as the customer get a little bit of what we want and IVS gets a little bit of what they want. As the industry market changes and the volatility with supply chain difficulties continues, that can really drive costs up. So having a good relationship where we work together and there's give and take on both sides is extremely important. I imagine that if we did not have the positive relationship that we do now, it would be much different picture.”

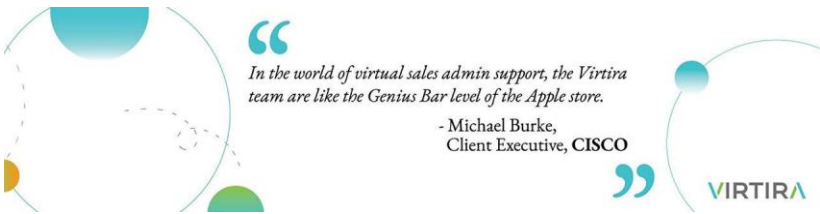
***How important is the role that IVS plays in your ability to attract your customers?***

“We rely on our industry reputation of being able to perform at a high level and that's what attracts and retains our valued customers. Working with IVS, it's like a pebble in the pond . . . the wave may be small, but it reaches out pretty far. The relationships that we have with our suppliers definitely affects the relationships with our customers.”

Here is a sample of how these customer service interviews were used to create the evidence for one of their AdWords landing pages.

<https://tri5co.lpages.co/industrial-ventilation-systems-fans-blowers-cooling/>

Here is a great example of a powerful positioning statement that was created from a customer service interview. This client provides virtual sales admin support, and this is a quote from an interview with one of their largest clients. Pretty hard for their competitors to top this.



When the Need and Timing for sales admin support are there, the TRUST, CURIOSITY, and EMOTION level of this quote will be at a 4 or 5 level and it will very likely generate a strong positive ACTION from the prospect.

Joe Prospect's Marketing Response Calculator					
Q1: NEED	Q2: TIMING	Q3: TRUST	Q4: CURIOSITY	Q5: EMOTION	ACTION
1	1	1	1	1	1
2	2	2	2	2	2
3	3	3	3	3	3
4	4	4	4	4	4
5	5	5	5	5	5

## Creating Marketing Copy from Customer Interviews vs. AI-Generated Marketing Copy

There is a reality now that you can generate fairly good marketing copy by using AI copywriting tools.

The operative word there is *'fairly good'*.

Whether marketing copy is generated by a *fairly good* human copywriter or a *fairly good* AI tool, it doesn't come close to the impact of the *exact feelings* your customers have about your product or service and your company. Not coming close in marketing, means there is a BIG difference in the effectiveness of the marketing and the number of *sales* it will generate.

An AI app can't interview your customers and decide which specific quote from the interview belongs where in your marketing content. It can't capture their tone of voice and the emotion that pours out of them when they talk about the struggles they went through before they found your company and the way they *felt* when they finally found a solution and a vendor they could trust.

### Customer Interview Quotes vs. Google Reviews

Think about what *you* are really looking for when you are deciding whether you want to get more information from a company and whether you feel comfortable buying their product or service. You want to find out *exactly* how you are going to *feel* when you buy and use their product or service. You are trying to project yourself into the shoes of their current clients. You would like to be able to talk to as many of their current clients as

you can to ask them what that company is *really* like, and what the experience of using their product or service is *really* like.

The idea of Google reviews is that you get to do that by reading unfiltered reviews that any of that company's customers can post. Google reviews are good up to a point. You have to have them when you are competing with other companies that have them, but you also need to get proof that goes a *lot* deeper than Google reviews. Remember, if everyone in your herd has Google reviews, that makes all of you look like part of the same herd. The only way you are going to separate yourself from your herd is to interview your customers and ask them the right questions, so that *your proof* cuts a lot deeper and has a lot more emotional impact on your prospects.

### **What about Branding?**

You are probably wondering at this point, where “*branding*” comes into play in all of this talk about proof and customer interviews. If you have looked at any of the marketing messaging that comes at you on a daily basis from marketing companies, you hear the word ‘branding’ thrown around all the time. What self-respecting marketing expert doesn’t talk about branding?

Here is what Joe thinks about branding.

You won’t find your brand by *thinking* or *talking* about it – especially not with a marketing consultant or agency that is going to charge you a lot of money to help you *discover* your ideal brand.



Your customer service interviews will *reveal* your brand to you, and the excerpts you select from those customer interviews to place into all of your marketing messaging including your website landing pages, etc., will *become* your brand. In the previous example, their Cisco executive customer *branded* our virtual sales admin client as being comparable to the ‘*Genius Bar level of the Apple Store*’.

Sorry, but I have to beat this drum again to prove this point. This landing page and similar landing pages, generated most of our 2,300 clients because the words and *feelings* of our clients, carefully selected from customer service interviews we did with them, *became* our brand. Our landing pages consistently beat out bigger, more sophisticated companies with huge marketing/branding budgets, because our *brand* jumped out at them when they read those short excerpts from the interviews. Our marketing was more *real* and compelling to our prospects.

<https://professionalprospecting.com/LandingPages/MarketingConsultant/>

Obviously, there is more to branding than just interviewing your clients. The overall look and feel and consistency of your website and your marketing collateral is important to create a unique presence for your company and make your prospects *feel* differently about your company. But the core feelings of your clients about your company, *in their own words*, need to be front and center in all of your marketing.

### **Joe's Sales/Profit Acceleration Tip**

If you are trying to create a brand for your company, you won't find that sitting around a boardroom table with your team and your marketing experts. *Ask your customers to tell you who you are and what you mean to them.*

### **What about SEO?**

It is clear that the new AI tools are able to generate content that will move your company up in the organic rankings. Whether you are using AI apps or traditional human content creators for your SEO, that content must mirror the search terms and content that prospects in your business category are already searching for. You have to play the copycat content game in order in order to move up in the rankings and get clicks, but you can supercharge your SEO content by injecting the *thoughts and feelings* of your clients into that content with your customer service interviews.

It is not enough just to get ranked on the page where your prospects will click on your website, the content on your website needs to have a **BIG emotional** impact on them to get them to take the next step and not dump you into the '*Seen That Done That*' file.

The algorithms that determine your rankings give significant weighting to the *quality* of your content. If you beef up your content with powerful emotionally compelling quotes from

your customer service interviews, that will keep your prospects on the page longer and get them to click through to other pages, which will improve the quality rating of your content.

Also, it is not enough that your marketing copy gets views, you want it to *convert* to leads and *sales*. The only thing that is going to get your prospects to take the next step when they view your copy, is *Curiosity, Trust* and *Emotion*, which you *only* get when you interview your customers and inject their *real feelings* into your marketing copy.

In a marketing world where SEO success to a large degree, depends on who can generate the best *copycat* marketing copy in order to move up in the rankings, you want to make sure that your marketing copy can't be copied. How can your competitors use direct quotes from *your* customers as *their* copy – even if they try to rework it to make it sound different? How can they copy audio clips from *your* customer service interviews?

### **Joe's Sales/Profit Acceleration Tip**

AI generated copy can be a great tool to save you time in your battle to move up in the organic rankings. But AI tools can't interview your customers and create the *proof* that will *always* be the core element in generating higher *conversions* to leads and sales.

## CHAPTER 7

### **Joe's Tactical Marketing Mistake # 4: Making it All About You**

We have all heard a million times that our marketing needs to focus on our prospects. Makes sense. But we still fall into the habit of only telling our prospects all the great stuff about *us* and *our company* in our marketing.

Why do you need to avoid that? And *how* do you avoid that?

You don't have to NOT tell your prospects all about you and how great you are. You just have to do it in the right way, *at the right time*.

Remember, prospects are sifting through all those marketing messages coming at them and ignoring 99% of them, because they *have to*. How can they pay attention to *everything* we want them to pay attention to?

In order to grab your prospect's attention and break through that giant glob of '*seen that done that*' marketing messages that are clogging up their brain, your prospect needs to see and feel *their own thoughts* in your marketing message.

The key to the extraordinary effectiveness of customer interview marketing quotes, is that you can first show your prospects what

it *feels* like to use your product or service. The first marketing messages they see and hear from you, are not all about you - they are all about how your customers *feel* about you! They inject powerful *Emotion* and *Trust* at the same time, into your marketing message.

Only *after* you have you have gotten your prospects excited about how great your customers feel about you, and your prospects can *feel* what it is like to be your customer, *then* you give them an opportunity to get more details about your product or service.

The AdWords landing page that was so successful for our company was all about how our clients felt about us. Each of the interview quotes that was scrolling on that page was carefully selected because it was showing a strong emotion that our client *felt* about our company and our marketing programs. Those carefully selected quotes injected powerful *Trust* and *Emotion* into that landing page, which resulted in the highest lead conversion rate in our category – *year after year*.

If prospects don't really care about *us*, who do they care about?

When it comes to evaluating which marketing messages to pay attention to, it seems that prospects only care about *themselves* and people like them. Selfish prospects!

Here is an example of how far you can take that idea and how powerful it is to make your marketing *all about them*.

In December of 2020, right during the peak of COVID, we began testing a new marketing strategy that we call the **Roundtable Marketing System**.

The marketing challenge for this client was monumental. Their marketing results had tanked at the beginning of COVID. They were trying to sell cost-saving consulting and training on raw material spending, to C-level decision makers at manufacturing companies between 100 million and 3 billion.

This was during COVID when the supply chain world-wide had fallen apart, and the only thing these manufacturers were worried about was *getting* their materials.

We came up with the idea of inviting these senior decision makers to Peer Roundtables where they could discuss *their problems* with other senior executives *like them*.

We had tested the Roundtable Marketing System for our company using both e-mail and LinkedIn. It worked well with e-mail but even better with LinkedIn.

On the next page you can see the stats for our client's Roundtable Marketing program for the 12-month period from December 2020 through to the end of December 2021.

We ran the campaign using the LinkedIn account of one of their senior sales reps. When the campaign began, he had only 150 qualified LinkedIn connections that he wanted to invite to his roundtables. We ran an automated LinkedIn outreach program to get more CXO level decision makers connected with him on

LinkedIn. Over the course of the 12 months, his connection total built up to around 800 CEOs and senior executives.

## Roundtable Stats: Cost-Saving Consultant selling to C-Level Manufacturing Executives

Roundtable Date & Topic	LinkedIn Invites	Registered		Attended		Sched Mtg	
		No.	%	No.	%	No.	%
12/17 - Pilot	150	7	5%	2	29%	-	0%
1/12 - Cost reduction	250	14	6%	2	14%	-	0%
1/21 - Cost reduction	150	16	11%	1	6%	-	0%
2/4 - Cost reduction	370	17	5%	5	29%	-	0%
2/16 - Resins case study	220	24	11%	11	46%	1	9%
2/18 - Indirect case study	370	22	6%	7	32%	2	29%
2/24 - Indirect CxO GTT	121	33	27%	5	15%	-	0%
3/11 - Resins	230	21	9%	6	29%	-	0%
3/23 - Indirect	300	44	15%	11	25%	11	100%
<b>Average 2021 Q1</b>	<b>251</b>	<b>24</b>	<b>9%</b>	<b>6</b>	<b>25%</b>	<b>2</b>	<b>29%</b>
4/15 - CxO	275	31	11%	2	6%	1	50%
4/22 - Resins	270	23	9%	4	17%	2	50%
5/27 - Cost knowledge	600	47	8%	6	13%	2	33%
6/7 - Electronics	600	46	8%	11	24%	2	18%
6/23 - Resins	275	17	6%	4	24%	0	0%
<b>Average 2021 Q2</b>	<b>404</b>	<b>33</b>	<b>8%</b>	<b>5</b>	<b>17%</b>	<b>1.4</b>	<b>26%</b>
7/27 - Talent	650	30	5%	3	10%	0	0%
8/18 - Indirect	800	25	3%	4	16%	0	0%
9/9 - Securing 2022	800	33	4%	2	6%	1	50%
<b>Average 2021 Q3</b>	<b>750</b>	<b>29</b>	<b>4%</b>	<b>3</b>	<b>11%</b>	<b>0.3</b>	<b>11%</b>
10/20 - Securing 2022	194	6	3%	5	83%	4	80%
11/4 - Resins	275	15	5%	10	67%	4	40%
11/18 - Freight	276	10	4%	2	20%	-	0%
12/8 - CMC	345	14	4%	9	64%	5	56%
12/16 - Leveraging purch	338	8	2%	3	38%	-	0%
<b>Average 2021 Q4</b>	<b>286</b>	<b>11</b>	<b>4%</b>	<b>6</b>	<b>54%</b>	<b>3</b>	<b>35%</b>

**Invited:800, Registered:503, Attended:115, One-One Meetings:35**

You can see that the results in the first quarter were pretty good when you consider that he was getting busy senior executives of large manufacturing companies to participate in his intimate roundtable meetings. But the results got even *better* in each successive quarter. The amazing thing about these roundtables is that the desire of these very senior, *very busy* executives to attend is *growing stronger* the more times they are invited.

And that was just in the first 12 months. These senior, very busy executives are *still* attending Mike's roundtables and will be for years because he has built up trust with them and made his marketing all about *them*.

Here is an e-mail our client received from the CEO of a \$500 million manufacturing company, who had not even attended one of the roundtables yet. He was excited just to be *invited*.

*Mike,*

*"I apologize for not attending the sessions, but this is an exceptionally busy environment at present. We are making some significant moves in growth, and it is consuming most of my time. I should begin to free up more in mid-May. I really appreciate the information sharing and despite my inability to attend, I will see if we can compile some information to share with you and the roundtable members."*

You can see that something truly *extraordinary* is going on here. By making these roundtable events all about your prospects, you will end up leading a group of your prospects in a discussion group where *you* are the expert who brought them together. They instantly *trust* you. Typically, it takes months or *years* of



relentlessly pushing out marketing collateral at your prospects, to get them to trust you.

Here is a sample of a Peer Roundtable invitation where the attraction is the other people like them.

**CEO  
STRATEGIC  
MARKETING  
ROUNDTABLE**

*Learn what other senior leaders are struggling with to improve their sales and marketing results.*



You may find the Roundtable Marketing System very disturbing if you have been struggling to create a steady stream of elaborate and *very expensive* marketing content trying to get your prospects to trust you.

There was no traditional marketing content in this campaign. The only content was an invitation to attend roundtable discussions with peers to discuss problems they had in common.

How can you build trust with your prospects *that fast*?

## How Do We Bridge the Trust Gap with our Impossible to Reach Prospects?



## The Accepted Formula to Create Trust

- Create great content and give it away
- Establish credibility by using testimonials & case studies
- Build a list
- Write whitepapers, books, publish a blog
- Create a podcast, appear on podcasts
- A lot of work, money and time
- It does work *but* - Is there a better, faster way?



## Switching Marketing Planets

Venus



Mars



## Alternative Strategy to Create Trust (quickly)

- Don't create a lot of content
- Don't spend a lot of money and time on your marketing
- Invite your prospects to Roundtables
- 10 times more effective, 1/10 the cost
- Crazy?



## Magnetic High-Level Roundtables:

They attract even the highestlevel decision makers at the largest companies



Is this a new model for marketing? *Does this mean we no longer have to create content?*

No. This shows that your content can take a different form depending on what stage you are at in the marketing and sales cycle with your prospect. The attraction of the roundtables for your prospect, is the type of people who will be attending the roundtable and the problems that are going to be discussed on the roundtable or workshop.

Think of the Roundtable Marketing System as *problem matching*. You match your roundtable topics to the problems you are best able to solve and the types of companies you solve them for, and that is the type of prospects you will attract to your roundtables.

You can create a *community* of roundtable participants and offer an ongoing series of roundtables and workshops on different topics, all related to your core product or service offering. Our client who was offering roundtables to busy senior manufacturing executives discovered that the level of interest in the roundtables grew *stronger* as they were invited to more and more roundtables over the course of 2020.

This doesn't mean that you have to throw out your traditional strategy of nurturing your prospects with ongoing e-mail content. Once your prospect has attended a roundtable or workshop on a specific topic, then you can move them into a traditional sequence of nurturing e-mails on that topic.

Here is a sample of the invitation message for one of Mike's roundtables where you can see that the problems and types of people on the roundtable are highlighted. The senior

manufacturing executives see that other senior executives *like them* are discussing *their problems* on the roundtables. *Problem and People matching*.

**Please join us for our next Peer Roundtable discussion on December 16 at 2:00 pm EST.**

**Discussion Highlights from December 9 Roundtable:**

**Strategic Cost Reduction Roundtable: Filling the 2022 Savings Pipeline**

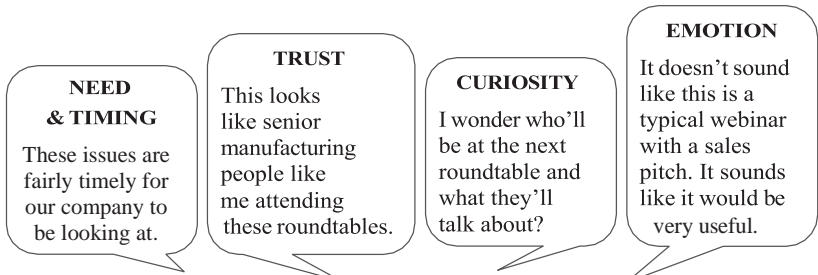
The roundtable theme was steps companies are taking to identify cost savings projects for the coming year. Highlights of the roundtable discussion are summarized below.

- Procurement Director for a household products manufacturer shared that raw material prices, particularly paper, have been a “nightmare”.
- Purchasing Director for a Noise, Vibration and Harshness Control materials manufacturer shared that they are seeing the slope of supplier price increases levelling out, and are planning to identify suppliers that are no longer price competitive.
- Global VAVE Director for an electronics manufacturer shared that have had success driving costs down by converting metal cast components to engineered resins, and shared that the Society of Plastics Engineers has many ongoing projects in this area.

Let's look at the Marketing Roundtable System through the lens of the **Prospect Response Calculator**.

Marketing Response Calculator					
Q1: NEED	Q2: TIMING	Q3: TRUST	Q4: CURIOSITY	Q5: EMOTION	ACTION
1	1	1	1	1	1
2	2	2	2	2	2
3	3	3	3	3	3
4	4	4	4	4	4
5	5	5	5	5	5

Joe CEO (*Joe Prospect was promoted*) looks at Mike's invitation and asks himself a series of questions.



We have looked at several examples which demonstrate that the **Prospect Response Calculator** can be very useful when you apply it to any component or stage of your marketing. The Prospect Response Calculator is simply a tool to remind you to *pay attention to what your prospect is thinking*. Your prospect uses the same screening questions to evaluate *all* of your marketing, at all stages of your marketing communication to them. To market successfully and profitably, you *always* need to focus on the *questions* your prospects are asking themselves.

- Q1.** Do I need this?
- Q2.** How soon do I need it?
- Q3.** Can I trust these guys?
- Q4.** Have I seen this before or tried something like this already?
- Q5.** How excited am I about taking the next step?

### **Joe's Sales/Profit *Acceleration* Tip**

Your marketing needs to get away from *your* thoughts and focus on the thoughts and feelings of *your prospect*. As a general principle, your marketing will be *a lot* more effective if you get out of your own head and into the head of your prospect.





## CHAPTER 8

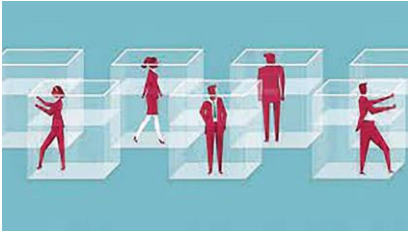
### **Joe's Tactical Marketing Mistake #5: Not Looking Past the End of Your Nose - Staying Stuck in Your Own Marketing Silo**

Everyone thinks they are a marketing expert. Why is that?

Because we are all marketed to 100 times a day. *We are all highly experienced prospects.*

Because we have had so much experience *consuming* marketing, we think we can cook up a great marketing recipe based solely on our own experience, and everything will be just fine.

When it comes to our own marketing, we make a lot of mistakes but this one is the *worst* mistake because it doesn't allow us to figure out where we are going off track with our marketing, and we just keep rolling along year after year with bad ineffective marketing. You do not have enough experience—enough data, to make sound marketing decisions completely based on your own knowledge and experience.



**Joe’s BIGGEST Market-  
ing Mistake:**

If you stay stuck in your own marketing silo and you have no data beyond the end of your nose to base your marketing decisions on, you will make bad marketing decisions.

Imagine that you could go up and get a 10,000-ft. view of your business in amongst all the other businesses in your industry, and amongst a whole bunch of businesses in other industries.

That is essentially what I am able to do because I have worked closely with over 2,300 businesses over many years, so I have been able to observe how they run their businesses and how they run their marketing and sales.

In this book, what I am trying to do is give you the same 10,000-ft. view of your business that I have, specifically when it comes to growing the sales and profits of your company.

**Sales/Profit Growth 10,000 Ft. View - Which Direction?**

Current Customers	Marketing & Sales Improvement	# of Presentations/ Year	Closing %	New Customers/Year	Total Customers	Profit Improvement Focus Areas	Lifetime Profit/Customer	Annual Profit
100		100	20%	20	120		\$2,000.00	\$240,000.00
100	CRM System + 10%	110	20%	22	122	Customer Intake and Set Up + 2%	\$2,040.00	\$248,880.00
100	Website + 10%	120	20%	24	124	Service Delivery + 10%	\$2,244.00	\$278,256.00
100	Public Relations + 10%	130	20%	26	126	Employee Recruitment + 2%	\$2,388.88	\$288,398.88
100	Referrals + 10%	140	20%	28	128	Employee Training + 2%	\$2,403.32	\$307,625.47
100	Resellers + 10%	150	20%	30	130	Employee Retention + 2%	\$2,451.39	\$318,600.76
100	Partners + 10%	160	20%	32	132	Pricing + 10%	\$2,696.53	\$335,941.90
100	Brochures, Mailers + 10%	170	20%	34	134	Accounting Systems + 2%	\$2,750.46	\$348,261.66
100	Facebook + 10%	180	20%	36	136	Customer Communication + 2%	\$2,805.47	\$351,543.63
100	LinkedIn + 10%	190	20%	38	138	Expansion of Services + 30%	\$3,647.11	\$503,301.20
100	Google AdWords + 10%	200	20%	40	140	Reseller Partnerships + 20%	\$4,376.53	\$412,714.90
100	SEO + 10%	210	20%	42	142		\$4,814.19	\$463,614.32
100	Telemarketing + 10%	220	20%	44	144		\$4,014.19	\$493,242.49
100	Trade Shows + 10%	230	20%	46	146		\$4,814.19	\$702,871.06
100	Messaging & Proof + 20%	274	20%	55	155		\$4,814.19	\$747,161.57
100	Lead Nurturing + 10%	304	20%	61	161		\$4,814.19	\$773,735.87
100	Lead Scoring + 10%	334	20%	67	167		\$4,814.19	\$802,967.60
100	Telephone Intake + 2%	351	20%	70	170		\$4,814.19	\$819,045.06
100	Lead Response + 2%	368	20%	74	174		\$4,814.19	\$833,976.38
100	Appointment Scheduling + 30%	479	20%	120	220		\$4,814.19	\$1,057,493.79
100	Sales Presentation + 10%	479	28%	132	232		\$4,814.19	\$1,115,037.54
100	Sales Proposal + 10%	479	30%	145	245		\$4,814.19	\$1,178,399.44
100	Post Presentation Follow Up + 10%	479	33%	159	259		\$4,814.19	\$1,248,097.53

What is this spreadsheet saying about your business and all of the other businesses out there that are trying to grow their sales and profits?

There are three things you need to focus on to accomplish your goal of growing your sales and making more profit from your business.

1. You need more appointments, meetings, demos, whatever you call them - more opportunities to present your product or service to your prospects.
2. You need to turn more of those meetings into clients or customers - close a higher percentage of sales.
3. You need to generate more revenue from each sale, by increasing the lifetime value of each client.

You may look at that long list of different things you can do to improve your Marketing & Sales results and say to yourself, “We’re only doing two of those things or three of those things, this approach isn’t realistic for our business.”

The big idea here is that you don’t have to be doing *all* of those things, you just have to be *aware* that you need to think about how you can improve the things you are already doing, and choose one or two other things to implement in your marketing.

Even if you hate spreadsheets and you don’t like to think about numbers – you just like to put your head down and work on your marketing, there is a simple principle to *get* here.

If you improve even *one* thing in the *Marketing & Sales Improvement* column on the left of the spreadsheet by even a

small percentage, that small improvement flows right over into the *Profit* column on the right of the spreadsheet.

If you add even *one* additional marketing strategy in the *Marketing & Sales Improvement* column, whatever number of additional meetings you get and additional closed sales you get, flows over into your *Profit* column.

You don't have to do a bunch of things. You just need to chip away at it, one thing at a time, either by focusing on improving something you are currently doing in your marketing or implementing one new thing.

The important point is that you can't stay stuck in your own silo. You can't just keep doing *only* the things you have been doing, exactly the way you have *always* been doing them, or nothing will move in the *Profit* column.

You will notice on the spreadsheet that I have arbitrarily assigned different percentages to each thing you can work on improving. Of course, those percentages won't apply exactly like that to your business. You may improve that area of your marketing by a higher or smaller percentage. *Who cares* what the ultimate percentage increase is. If you focus on improving that area – you will probably be able to improve it.

Some of the items in the spreadsheet are highlighted in blue. That is because those things will impact more than one area of your marketing & sales process. You will get a double or triple whammy in your *Profit* column by improving those things.

*Partners* is highlighted in blue. That is because if you find one good referral or reseller partner, they may refer 20 or 30 clients to you over the course of your long-term relationship with them. When they refer a prospect to you, that prospect is more likely to be a qualified prospect and they will trust you more than a cold prospect, so you are more likely to get a meeting with them and more likely to close a sale. *And* they are more likely to stick around longer and be worth more in terms of their lifetime value, because they trusted the person who referred them to you so they will trust *you*.

*Messaging & Proof* is highlighted in blue for the same reason. If you interview your customers and get *really* strong proof, you will improve your messaging and get more leads. Those leads will be higher quality leads because those prospects will trust you more. You will get a higher percentage of meetings with those prospects because they have seen stronger proof in your marketing collateral and on your website. You will close more sales because they saw stronger proof leading up to the meeting, and your proof in your sales presentation is stronger. They will also stick around longer because they *believe* more strongly in your company right from the beginning.

If you think that is pie-in-the-sky thinking, have a look again at the proof on the landing page that generated at least 1500 of our 2,300 clients for our business.

<https://professionalprospecting.com/LandingPages/MarketingConsultant/>

*Referrals* is another good example of a *double or triple whammy* profit improvement area to work on. Leads that come in via referrals don't cost anything so each sale that comes from a referral generates more net profit. Referrals *trust* you because they *trust* the person who referred them. Because they trust you, you get more meetings from referrals and close a higher percentage of sales. Referred clients will stick around longer because they started with a strong level of trust. Can you see all of those numbers in the spreadsheet jumping up right across the board when a referral comes in?

*Appointment Solidification* is also highlighted in blue. When you book a meeting with your prospect whether it is a face to face or online meeting, those meetings don't all materialize as you would like them to. You undoubtedly lose a lot of meetings or end up with a very weak meeting with a disinterested prospect. If you make sure your prospect receives a package that includes lots of *really* strong proof *before* your meeting, your show up rate and your closing rate will be significantly higher. Too expensive? Think about the lifetime value of even *one* more customer.

One of our clients was a membership recruiting consultant to private golf clubs and we were scheduling online meetings for him with the President or Chairman of the Board of private clubs. We used strong proof from customer interviews to get the meeting booked and 50% were showing up for the meeting, which is pretty good. But he was still losing 50% of his meetings which translated into a big chunk of lost \$ in his *Profit* column. By implementing the Appointment Solidification step and sending a professionally designed information booklet by courier one day prior to the meeting, his show up rate for scheduled meetings went up by 30%. That 30% increase flowed over into

his *Profit* column and his *Lifetime Profit/Customer* column. What was in this information booklet was more proof and an even *deeper* level of proof. We put the entire interview with two of his golf club clients in the booklet.

In the *Profit Improvement Focus Areas* column over to the right on the spreadsheet, there are several things which you can work on in your business after the sale, which if improved, will bump up your lifetime value per customer.

Remember that your business is one of hundreds or thousands of businesses like your's in some ways. You are all part of the same herd but some of you are getting a lot more meetings, closing a lot more sales and earning a lot more profit. If you are wondering *why*, the answer is somewhere right in that spreadsheet. The businesses that are making more profit must be doing some of those things better than you are, or they are doing just a few more of those things.

Don't feel bad or overwhelmed about it, just chip away at it and knock off one improvement at a time. *Get out of your silo.*

In the final three chapters of this book, we will look at three examples of our current clients that are struggling to get out of their own marketing silo and accelerate their marketing and sales results. You will see that it is not that easy or fast, but you will also see that the principles in this book are *real*, and they do work.

## CHAPTER 9

### **Joe's BIG Tactical Marketing Mistake # 6: Failing to Plug the Cracks in Your Marketing System**

# **The HUMAN Marketing & Sales Operating System**

Over the course of working with over 2,300 clients, we have accumulated hundreds of glowing testimonials on our websites, and we could have gotten hundreds more if we wanted to. But for many of our clients, we couldn't always produce the *'hit it out of the park'* results that generated those

107



glowing testimonials. We also had our fair share of ‘*swing and miss*’ client marketing campaigns.

We could argue that we used the same Prospect Response Formula for all of our campaigns so it must have been the fault of our clients. They must not have followed our instructions. Like the thirty or so out of fifty insurance brokers we worked with that wouldn’t follow the system that was implemented so successfully by our insurance broker client in Georgia. We used the same messaging and strategy, and they opted out of the campaign too soon to allow enough points to build up with their prospects.

That explanation may be partially valid. We did try to implement the same marketing system for all of our clients and the system did work and continues to work when it is implemented properly. BUT, blaming it all on our clients would be a major cop out. Blaming it on the clients doesn’t fix it. It doesn’t get to the root cause of *why* marketing campaigns can fail even when they are based on proven marketing strategies.

We don’t like to admit it, but we are the ones who are responsible. Our marketing system must have had some cracks in it. So, we came up with **The Marketing & Sales Operating System (MS-OS)** to plug the cracks in the marketing and sales process.

A Marketing & Sales Operating System probably sounds *horribly* complicated. It isn’t really. A good marketing system is technology and humans working in tandem and backing each other up - covering each other’s *you know what*.

The humans should be the Kings and Queens of a good marketing system. The system is designed to fit them - *they shouldn't have to fit the system*. The purpose of the technology in the ideal marketing and sales system is to automate as many of the steps *for the humans* as possible, and make sure the system accounts for the misgivings, miscalculations, and misfortunes of normal people.

“Hey, I’m only human after all.”



**Joe’s Sales/Profit Acceleration  
Tip**

The ideal marketing system needs to *fit* the people the system is designed to help. *The people shouldn't be forced to fit the marketing system.*

A good marketing system has the backs of *all* the humans involved in the marketing and sales process. The system needs to be designed to make things easier, more understandable, and *more enjoyable* for the people delivering the marketing – the vendors or service providers, *AND* the people receiving the marketing – *the prospects*.

Here is a sample of what an actual MS-OS looks like when we start to work with a client. In the next chapter we will look at how the MS-OS for this client has evolved over the past six months.

## MARKETING & SALES OPERATING SYSTEM

### Marketing Reality Assessment

What type of marketing strategy works best in your industry?

What are the financial realities of your business?

What are your available resources?

Align your marketing plan with industry best practices and your financial & resource realities

### Resources

Director of Business Development

Inside Salesperson (mainly admin)

New Technical sales rep hire

Website & Marketing Collateral? (*Newsletter list*)

Arthur's Qualified LinkedIn Connections? (*out of 680 how many are companies we want to target*)

Sales Reps Qualified LinkedIn Connections?

## SET UP (3-4 Weeks)

### Creative

Interviews with Mike & Andy completed, interview with Arthur; schedule interviews with current Structural Engineering customers & create testimonial collateral

Create sequence of e-mails for short & long-term nurturing

### LinkedIn

Organize current qualified LinkedIn connections from Arthur & sales reps accounts

Create outreach list of ideal prospects in Arthur's LinkedIn account & possibly sales rep(s) accounts

Create connection request and follow up messaging

Modify Arthur's LinkedIn profile to match campaign positioning (create banner in LinkedIn profile)

Set up automation software for outreach - new connections import directly into Funnel-maker

**CRM/E-mail Automation**

Create e-mail templates and workflows (*automated e-mail sequencing & alerts to sales reps*)

Create calling scripts for IVS or PPS (*call high interest leads that have opened multiple times*)

Create calling e-mails (*callers send e-mails using Arthur's e-mail address*)

Create calling voice-mails (*vm messages recorded by Arthur & dropped into prospects vm inbox*)

Create custom fields, Lead Groups, Reports

**AdWords**

Run Keywords Analysis Report to identify high-value search terms to bid on

Create ads & landing pages

**Implementation****LinkedIn**

Send 40-50 connection requests/day

Send automated follow up messages to new connections

Actively engage with LinkedIn prospects and direct qualified leads to Arthur or sales reps

**CRM/E-mail Automation**

Add e-mail addresses for LinkedIn leads that don't connect to Funnelmaker lead nurturing campaign

IVS Team or PPS Team will monitor Lead Scoring reports and make follow up calls to high-interest leads

IVS Sales reps can also call or e-mail high-interest leads (*workflows to alert sales reps when to follow up*)

**AdWords**

Leads flow into the same e-mail lead nurturing and sales follow up sequence in Funnelmaker

Monthly Campaign management & optimization

**Sales Activity** (*for Arthur & IVS Sales Reps or Inside Sales Rep*)

Respond to high interest qualified leads via LinkedIn, E-mail, Phone  
Conduct one-one meetings & sales follow up (*Funnelmaker lead nurturing sequence until closed*)

### **Campaign Monitoring & Review**

Weekly Meetings with IVS Team  
Calls & E-mails to Kevin or David

The first step in designing a good MS-OS starts with a **Marketing Reality Assessment**. We look at:

- What type of marketing works best in the client's industry?
- What are the current financial realities of the client's business?
- What kind of budget can they count on consistently for a period of at least six months?
- What are the client's available resources?
- What marketing pieces and programs/vendors do they have in place?
- Who is on their marketing and sales team and who are they planning to add to the team?

The task then is to align the MS-OS with industry best practices and the financial and resource realities of the client.

Every step of the process through the set-up, implementation, and monitoring stages of the campaign, is planned and budgeted appropriately. The key principle of the MS-OS is to *account* for every step so there are no missing pieces, and nothing falls through the cracks.

**Joe's Sales/Profit Acceleration Tip**

Your marketing plan doesn't have to be complicated. You just need to create a list of the steps you will take to set up and implement your marketing and who is going to do each step. You can adjust your plan as you go along, but *you do need a plan* in order to get started on the right foot and stay on track.

The next three chapters go inside some actual client campaigns where there are Marketing & Sales Operating Systems being actively implemented for three of our clients. These campaigns are moving along, evolving and adapting right now as you are reading this.

## CHAPTER 10

# Real Live Example #1 of the Marketing & Sales Operating System in Action: Design/Builder of Industrial Ventilation Systems

This is one of the clients we have seen a couple of times earlier in the book. We started working with them in August of 2022. They are custom design/builders of industrial ventilation systems throughout North America. We started working with them during the period when the supply chain world-wide was in disarray because of COVID. They had multiple projects on hold because of supply chain issues. They needed to implement more aggressive marketing, but they had to keep the budget low because of the supply-chain related revenue issues they were currently experiencing. Here is the 10,000 ft. view.

Sales/Profit Growth 10,000 Ft. View - Which Direction?									
Current Customers	Marketing & Sales Improvement	# of Presentations/Year	Closing %	New Customers/Year	Total Customers	Profit Improvement Focus Area	Lifetime Profit/Customer	Annual Profit	
100		100	20%	20	120		\$2,000.00	\$240,000.00	
100	CRM System +10%	110	20%	22	122	Customer Intake and Set Up + 2%	\$2,040.00	\$248,880.00	
100	Website +10%	120	20%	24	124	Service Delivery +10%	\$2,244.00	\$278,256.00	
100	Public Relations +10%	130	20%	26	126	Employee Recruitment + 2%	\$2,268.00	\$283,908.00	
100	Referrals + 10%	140	20%	28	128	Employee Training + 2%	\$2,403.32	\$307,625.47	
100	Resellers +10%	150	20%	30	130	Employee Retention + 2%	\$2,451.39	\$318,680.76	
100	Partners +10%	160	20%	32	132	Pricing + 10%	\$2,696.53	\$355,941.90	
100	Brochures, Materials +10%	170	20%	34	134	Accounting Systems + 2%	\$2,750.46	\$368,561.66	
100	Facebook +10%	180	20%	36	136	Customer Communication + 2%	\$2,805.47	\$381,543.63	
100	LinkedIn +10%	190	20%	38	138	Expansion of Services + 30%	\$3,647.11	\$503,301.20	
100	Google AdWords +10%	200	20%	40	140	Reseller Partnerships + 20%	\$4,376.53	\$612,714.50	
100	SIC + 10%	210	20%	42	142		\$4,814.19	\$683,814.32	
100	Telemarketing +10%	220	20%	44	144		\$4,814.19	\$693,242.69	
100	Trade Shows +10%	230	20%	46	146		\$4,814.19	\$702,871.06	
100	Messaging & Proof +20%	274	20%	55	155		\$4,814.19	\$747,161.57	
100	Email Lead Nurturing +10%	304	20%	61	161		\$4,814.19	\$773,735.87	
100	Lead Scoring +10%	334	20%	67	167		\$4,814.19	\$802,967.60	
100	Telephone Intake + 5%	351	20%	70	170		\$4,814.19	\$819,045.06	
100	Local Response + 5%	368	20%	74	174		\$4,814.19	\$839,924.98	
100	Appointment Satisfaction +30%	479	20%	120	200		\$4,814.19	\$1,257,493.79	
100	Sales Presentation +10%	479	20%	132	232		\$4,814.19	\$1,115,037.54	
100	Sales Proposal +10%	479	30%	145	245		\$4,814.19	\$1,178,399.44	
100	Post Presentation Follow Up +10%	479	33%	159	259		\$4,814.19	\$1,248,097.53	

The areas highlighted in yellow on the 10,000 ft. view, are their areas of strength. The areas we are working on are highlighted in green. They had a reasonably good website, and they were getting some leads from their website. They were getting referrals and repeat business from design engineering firms. They had a good sales proposal process in place. They were very good at delivering their service and they were getting plenty of business. That was fine during normal business times, but COVID showed them that you need to have a long-term marketing strategy to deal with the shifting sands of up and down business cycles.

There were plenty of opportunities to improve things they were already doing and implement some new things. The areas we chose to focus on are highlighted in green.

We wanted to keep the initial marketing budget relatively low. We needed to focus on a few things that would give the client the best bang for their marketing buck.

Historically, this client had relied mainly on referrals and repeat business from industrial engineering and construction firms. We decided that we would try to expand those types of relationships by reaching out to industrial engineering and construction firms in LinkedIn. We also planned to run an AdWords campaign to try to get some shorter-term projects that would generate revenue fast.



## MARKETING & SALES OPERATING SYSTEM

### Marketing Reality Assessment

What type of marketing strategy works best in your industry?

What are the financial realities of your business?

What are your available resources?

Align your marketing plan with industry best practices and your financial & resource realities

### Resources

Director of Business Development

Inside Salesperson (mainly admin)

New Technical sales rep hire

Website & Marketing Collateral? (*Newsletter list*)

Arthur's Qualified LinkedIn Connections? (*out of 680 how many are companies we want to target*)

Sales Reps Qualified LinkedIn Connections?

## SET UP (3-4 Weeks)

### Creative

Interviews with Mike & Andy completed, interview with Arthur; schedule interviews with current Structural Engineering customers & create testimonial collateral

Create sequence of e-mails for short & long-term nurturing

### LinkedIn

Organize current qualified LinkedIn connections from Arthur & sales reps accounts

Create outreach list of ideal prospects in Arthur's LinkedIn account & possibly sales rep(s) accounts

Create connection request and follow up messaging

Modify Arthur's LinkedIn profile to match campaign positioning (create banner in LinkedIn profile)

Set up automation software for outreach - new connections import directly into Funnel-maker

### **CRM/E-mail Automation**

Create e-mail templates and workflows (*automated e-mail sequencing & alerts to sales reps*)

Create calling scripts for IVS or PPS (*call high interest leads that have opened multiple times*)

Create calling e-mails (*callers send e-mails using Arthur's e-mail address*)

Create calling voice-mails (*vm messages recorded by Arthur & dropped into prospect's vm inbox*)

Create custom fields, Lead Groups, Reports

### **AdWords**

Run Keywords Analysis Report to identify high-value search terms to bid on

Create ads & landing pages

## **Implementation**

### **LinkedIn**

Send 40-50 connection requests/day

Send automated follow up messages to new connections

Actively engage with LinkedIn prospects and direct qualified leads to Arthur or sales reps

### **CRM/E-mail Automation**

Add e-mail addresses for LinkedIn leads that don't connect to Funnelmaker lead nurturing campaign

IVS Team or PPS Team will monitor Lead Scoring reports and make follow up calls to high-interest leads

IVS Sales reps can also call or e-mail high-interest leads (*workflows to alert sales reps when to follow up*)

### **AdWords**

Leads flow into the same e-mail lead nurturing and sales follow up sequence in Funnelmaker

Monthly Campaign management & optimization

### **Sales Activity (for Arthur & IVS Sales Reps or Inside Sales Rep)**

Respond to high interest qualified leads via LinkedIn, E-mail, Phone

Conduct one-one meetings & sales follow up (*Funnelmaker lead nurturing sequence until closed*)

### **Campaign Monitoring & Review**

Weekly meetings with IVS team to review stats

Calls & emails to Kevin or David

## **The Set-Up Process:**

Initially when we started the campaign, the owner of the business, Arthur, had quite a bit of time to participate in the process because most of their projects were on hold because of supply chain issues.

We interviewed Arthur and Andy, the Sales Manager and we also interviewed five of their long-term customers. We incorporated the content of those interviews into the e-mail drip sequence that we set up in the CRM/E-mail Automation program.

Below is a draft sample of one of those e-mails where we incorporate the content from interviews with our client and one of their customers. When you use interviews as the core element in your marketing messaging, your marketing content *practically writes itself*.

**E-mail Name: IVS – July 2022 LN e-mail #1**

**Subject: Need a ROBUST ventilation system**

Hi <First Name>,

For over 30 years IVS has been providing turn-key, engineered solutions for customers needing industrial air moving equipment, acoustical control designs, air handling and HVAC systems in the oil and gas transmission facilities, co-generation and other power plants, and industrial manufacturing and warehousing industries.

***"IVS does what they say they are going to do, and I've learned to expect nothing less. That goes to a hundred percent return. I appreciate them continuously moving forward with us."*** – Chief Estimator, Industrial Building Manufacturer

***How does IVS differ from their competitors?***

In the words of the Director of Business Development for IVS:

"What makes us unique in our industry is our ability to take your application, and design-engineer and manufacture that equipment to your specifications; ***from concept to completion, we get it done.*** In our industry, we're one of only a handful of companies that do that in North America.

Most of our competitors will offer their customers a 'custom' fan system which means that they'll buy the panel fan from a fan manufacturer, and the silencer from somebody else, the radius hood from another, and hope that it all goes together. Whereas ***we build the entire integrated system for our customer.***

That's really who we are and what defines us and separates us from some of our competitors. And the fact that we're very industrial – ***everything we manufacture is robust and built to last***. Most of our competitors use inexpensive metals and thus their products do not stand the test of time.

The first word in our name, 'Industrial', sets us apart. The majority of our customers will tell you that. You can compare an IVS system with someone else's system and you can see a difference right away."

Industrial Ventilation Systems has full in-house engineering, acoustical analysis, design and Auto CAD capabilities. We are familiar with API, NFPA and FERC standards as they relate to our customers tough industry challenges. Give us a call to discuss your ventilation needs – we're here to provide solutions!

We ran a keyword analysis report to determine how many companies were searching for our client's main products or services online. Here is a sample of one of the Keyword reports for this client.

<b>Keyword</b>	<b>Monthly Impressions</b>	<b>Estimated Bid</b>
<b>Industrial Ventilation campaign</b>		
air handlers	463.33	12.31
air handling systems	62.3	14.3
air handling units	20.9	8.46
air ventilation systems	26.47	8.5
Custom ventilation	10	6.59
industrial air extractor	16.72	9.78
industrial air moving	0	
industrial air moving design	0	
industrial air systems	10	10.06
industrial cooling	238.24	10.99
industrial fans	5172.56	5.22
industrial ventilating fan	10	5.57
industrial ventilation	591.05	5.84
industrial ventilation design	8.36	
industrial ventilation manufacturer	0	
industrial ventilation systems	43.55	4.91
plant cooling	0	
plant fan system	0	
roof top ventilation	10	7.59
ventilation design	0	
ventilation engineer	0	
ventilation products	4.18	
ventilation services	31.01	13.54
ventilation systems	539.95	5.65
wall ventilation	7.87	1.11
warehouse ventilation fans	7.39	6.86

From this report, we could see that there are several of our client's product categories with lots of search traffic. We selected four main product areas to focus on and launched the AdWords campaign. The ads and landing pages are created in line with the Prospect Response Calculator. In the ad copy, we try to create credibility at the same time as we are trying to leave a big unanswered question (*Curiosity*).

In order to help our client market profitably in the highly competitive AdWords arena, we have to make sure that our ads and our landing pages hit all the right buttons on the Prospect Response Calculator.

Here is a sample of one of the landing pages we used.

<https://tri5co.lpages.co/industrial-ventilation-systems-fans-blowers-cooling/>

This is a case where we are trying to hit the *NEED*, *TRUST*, *CURIOSITY* and *EMOTION* buttons all at the same time by playing a video with the direct words of some of the client's best customer who express how they *feel* about IVS.

The prospect who wants to find a vendor that will make them *feel* like that, will respond.

We also used an analytics tool to capture information on companies that were coming to our client's website and landing pages, but they had not filled out the response form or called. We identify the key contacts at those companies through

LinkedIn and those leads go into the lead nurturing workflow in the CRM.

### **Automating the Lead Follow Up:**

All leads from LinkedIn and Adwords are moved into the CRM using Zapier where they receive a sequence of e-mails. Those leads are scored according to the level of interest they show in the e-mails (*clicks on links in the e-mail*) and the sales rep is alerted with an automated e-mail when the lead score reaches a certain number.

## **Implementation**

The initial step in the campaign was to reach out to project managers and engineers at industrial design/build companies through Arthur's LinkedIn account. Once someone connected with Arthur, we moved that lead into the CRM to receive a sequence of automated e-mails. Our objective was to deliver a series of e-mails that showed clear *proof* that IVS provides a truly superior level of service that goes way beyond their competitors. The best way to prove that was by using the exact words and *feelings* of their customers.

We automate as many of the steps in the marketing and sales process as we can for our client. We automated the LinkedIn connection campaign and the follow up response when someone connected with Arthur, using LinkedIn automation software. We set up work flows in the CRM so that each lead was scored based on how many times someone opened an e-mail or clicked on a link. Arthur and Andy were automatically notified by



e-mail when a lead was showing a high level of interest based on their lead score.

It became very evident that this client needed their marketing and sales process to be as automated as possible once we were about four months into the campaign. The proposals they had out there finally started to come through and they got incredibly busy with new projects. Both Arthur and Andy were swamped with work and no longer had much time to spend on the marketing process we had set up.

No problem there. Because we had automated the entire marketing process in LinkedIn and the CRM, the marketing campaign just kept chugging along seamlessly. We also set up a second automated LinkedIn outreach campaign using Andy's LinkedIn account and those leads were flowing into the e-mail workflow in the CRM.

### **Assessing Progress & Making Adjustments:**

Because the client is getting much busier with new projects, we have had to make adjustments to the MS-OS to take away some of the sales activities they no longer have time for and automate those tasks in the workflows in the CRM. Initially we were requesting exploratory meetings in our LinkedIn messages. Once Arthur and Andy started to get very busy with quoting and active projects, we removed the request for a meeting from the LinkedIn messages and relied on moving the new LinkedIn connections into the email automation sequence in the CRM.

The client has assigned Laura, one of their internal team members, to assist in the sales activities so we have set her up

in the CRM to help her with her assigned tasks. A new team member Lina is being brought on board so we will set her up in the CRM and automate as many of her tasks as possible by setting up additional workflows in the CRM.

Their marketing and sales system must *adapt* to fit the people and changing circumstances involved in the process.

### **Where does IVS go next?**

There are other marketing opportunities that we could implement for this client. We could invite their growing LinkedIn connection list of project managers and engineers to a series of roundtables and workshops. We could implement an SEO campaign based on their ideal keyword phrases that we have already identified in their AdWords campaign. We could implement outbound follow up calls to high-interest identified leads that have come in through the AdWords campaign or clicked on the website link in the e-mails.

The happy scenario for this client is that they have a wealth of unexploited marketing opportunities that they can implement whenever they are ready. There is a steady flow of qualified prospects entering their marketing and sales pipeline. All they have to do, is to stay in front of them until the timing is right for the prospect. We are doing that through automated emails.

The reality though is, they have too many qualified leads and not enough time to follow up with all of them right now. They will have to work on expanding their service delivery capacity before we crank up their marketing any further. Nice problem to have.

That is the beauty of the Marketing and Sales Operating System (MS-OS). It is designed to allow your marketing and sales process to flex with the changing circumstances your company is experiencing. If you need to add a new sales rep, you can place them into your automated marketing workflows in your MS-OS. If someone on your team is sick or doesn't have enough time to keep up with everything on their plate, you can shift some of their tasks over to someone else in your MS-OS, or further automate those tasks. You can crank your marketing up or down depending on your delivery capacity.

The most important thing is, they *have* a Marketing and Sales System (MS-OS). It is critical that you have a *system* for your marketing. Even if it is not a perfect system, it will keep you moving in the right direction no matter what ups, downs and sideways turns happen in your business.

## CHAPTER 11

### **Real Live Example #2 of the Marketing & Sales Operating System in Action: User Experience Consultant to Software Companies**

We have been working with this client for two months. He is a solo consultant with 20+ years of experience providing user experience consulting to software companies. He is hired by the CEO or the Product Improvement Director or similar title, to provide consulting to SaaS clients improve the experience of the users of their software programs.

Generally, consultants in this arena charge between \$100 - \$150 per hour on short-term engagements, less per hour on longer-term engagements. They work from referrals, and they list themselves on freelance job platforms like Behance, Dribbble, Coroflot.& Upwork.

Our objective for this client, is to develop a Marketing & Sales Operating System (MS-OS) that will get him a steady flow of qualified prospects and allow him to sell his services at a much higher hourly or monthly fee. Let's take a look at his situation from the 10,000-ft. view.

Sales/Profit Growth 10,000 Ft. View- Which Direction?								
Current Customers	Marketing & Sales Improvement	# of Presentations/Year	Closing %	New Customers/Year	Total Customers	Profit Improvement Focus Area	Lifetime Profit/Customer	Annual Profit
100		100	20%	20	120		\$2,000.00	\$240,000.00
100	CRM System + 10%	110	20%	22	122	Customer Intake and Set Up + 2%	\$2,040.00	\$248,880.00
100	Website + 10%	120	20%	24	124	Service Delivery + 10%	\$2,244.00	\$278,256.00
100	Public Relations + 10%	130	20%	26	126	Employee Recruitment + 2%	\$2,288.88	\$288,398.88
100	Referrals + 10%	140	20%	28	128	Employee Training + 2%	\$2,403.32	\$307,625.47
100	Retailers + 10%	150	20%	30	130	Employee Retention + 2%	\$2,451.39	\$318,680.76
100	Partners + 10%	160	20%	32	132	Pricing + 10%	\$2,696.53	\$335,941.90
100	Brochures, Mailers + 10%	170	20%	34	134	Accounting Systems + 2%	\$2,730.46	\$368,561.66
100	Facebook + 10%	180	20%	36	136	Customer Communication + 2%	\$2,805.47	\$381,543.83
100	LinkedIn + 10%	190	20%	38	138	Expansion of Services + 30%	\$3,647.11	\$503,301.20
100	Google AdWords + 10%	200	20%	40	140	Retailer Partnerships + 20%	\$4,376.53	\$612,714.50
100	SEO + 10%	210	20%	42	142		\$4,814.19	\$663,614.32
100	Telemarketing + 10%	220	20%	44	144		\$4,814.19	\$673,242.49
100	Trade Shows + 10%	230	20%	46	146		\$4,814.19	\$702,871.66
100	Messaging & Proof + 20%	274	20%	55	155		\$4,814.19	\$747,161.57
100	Email Lead Nurturing + 10%	304	20%	61	161		\$4,814.19	\$773,735.87
100	Lead Scoring + 10%	334	20%	67	167		\$4,814.19	\$802,967.40
100	Telephone Intake + 5%	351	20%	70	170		\$4,814.19	\$819,045.06
100	Lead Response + 5%	368	20%	74	174		\$4,814.19	\$855,926.38
100	Appointment Solidification + 30%	479	25%	120	220		\$4,814.19	\$1,057,493.79
100	Sales Present at ion + 10%	479	28%	132	232		\$4,814.19	\$1,115,037.54
100	Sales Proposal + 10%	479	30%	145	245		\$4,814.19	\$1,178,399.44
100	Post Presentation Follow Up + 10%	479	33%	159	259		\$4,814.19	\$1,248,097.53

THE MARKETING TRUST

Where does his business sit in comparison with all the other solo consultants and consulting organizations that are providing the same type of service? He is currently relying on his website, referrals (*highlighted in yellow*) and advertising on freelancer sites. He needs to make those two areas more effective and/or add other marketing programs into his marketing mix. The areas that we are implementing are highlighted in green.

Even though he is highly skilled at what he does (*highlighted in yellow*), his fee is at the lower to mid level end of the spectrum for his industry. He needs to create a much stronger *position* for himself and his company so he can command higher fees and longer-term engagements.

He is doing everything in his business, so he needs to automate as many of his marketing and sales tasks as possible. Once his MS-OS is generating new clients efficiently, he should work towards replicating himself by bringing on virtual assistants or independent contractors, and partner with other people to

help him sell and/or deliver more of his service. Here is his MS-OS plan:

## MARKETING & SALES OPERATING SYSTEM

### Marketing Reality Assessment

What type of marketing strategy works best in your industry?

What are the financial realities of your business?

What are your available resources?

Align your marketing plan with industry best practices and your financial & resource realities

### Resources

20 years experience delivering User Experience consulting (highly skilled and knowledgeable)

Some referral sources developed over the years

Some viable freelance advertising platforms have been used in the past

Some marketing collateral (white papers and articles)

Website

Very few current qualified LinkedIn connections

### SET UP

#### Creative

Interview current clients to create evidence collateral

**Who**

PPS

#### LinkedIn

Determine ideal prospect criteria, industry, # of employees, title, etc.

PPS

Segment ideal current LinkedIn connections

PPS

Create ideal prospect lists in Sales Navigator

PPS

LinkedIn Automation software and Sales Navigator

PPS

Modify Client LinkedIn profile to match campaign positioning

PPS

Create Connection Message	PPS
Create LinkedIn Roundtable Invitation Message	PPS
Create 2nd LinkedIn Roundtable Invitation	PPS

### **CRM/E-mail Automation**

Create Roundtable Summary E-mail Template for Attendees	PPS
---	-----

### **Calendly**

Schedule Roundtable meetings	PPS
Create Roundtable Description	PPS
Create Meeting Confirmation	PPS
Create Roundtable 7-day, 1-day, 1-hour reminders	PPS

### **Roundtable Prep**

Create Roundtable & Workshop slides & presentation notes	PPS/Client
Conduct Roundtable Prep Session	PPS/Client

## **IMPLEMENTATION**

### **LinkedIn**

integrate contacts with LinkedIn URL to LinkedIn automation software	PPS
Send connection message (automated)	PPS
Send Roundtable invitation message to new connections (automated)	PPS
Send Roundtable invitation message to current connections (automated)	PPS

### **CALENDLY**

Create Roundtable & Workshop description, confirmation & reminder e-mails	PPS
---	-----

### **CRM E-mail Automation**

LinkedIn connections are integrated into CRM with Zapier	PPS
Send Roundtable Follow Up E-mail w/summary to Attendees	PPS

Send Roundtable Follow Up E-mail w/summary to No Shows	PPS
--	-----

### SALES ACTIVITY

Reply to LinkedIn & e-mail invitation responses and register people for Roundtable in Calendly	Client
Conduct Roundtables & Workshops	Client
Create Roundtable Summary from meeting transcript	Client
Conduct one-to-one sales meetings	Client

The first thing we needed to do was create the evidence by interviewing some of Sam's clients. The customer service interviews with current or former clients form the underpinning of everything you are trying to accomplish with your marketing. They are the *key* building block to *profitable* marketing.

Here are some samples of the powerful evidence that came from those interviews and how Sam is using that evidence. When he runs the roundtables, he *positions* himself as a user experience *expert* who is at the top of his game and is *entitled* to command greater respect and *higher fees*.



*Here is a sample of how Sam introduces himself at the roundtable.*

“With great modesty, I fancy myself as a Revenue & Profit Building user experience consultant for software companies. I have been doing this for over 20 years. When I am brought in, my focus is entirely on improving revenue and profits. I listen, I observe, and I interview the internal team and the customers, and the path to greater revenue and profits usually jumps out at me.”

Here are a couple of excerpts from interviews with my clients:

**CEO of Developer Tools Company- Baltimore Maryland:**

*“When we brought Sam in, he did his analysis and correctly pointed out that he didn’t see a path to make this product work which led to us shifting direction. If we had brought Sam in sooner, it would have saved us \$4 million by avoiding the product investment.”*

**CEO Backup Reporting & Monitoring Software Company:**

*“Our conversion rate on trials was 20-25%, now it’s over 50%”*

“What I am hoping we can accomplish with these Roundtable discussions, is to pick one another’s brains to help all of us improve user experience and revenue and profits.”

**Here is recap of what we discussed on the last roundtable:**

- There is a tension between UX designers knowing enough so that they can meaningfully contribute, and knowing too much so that they can't think out-of-the-box solutions.
- What is clear is that fully onboarding UX takes a lot of time and effort. In complex software sometimes changing one thing affects 10 other things. Real focus is needed to onboard new employees, including UX.
- Create a trio in each scrum team: the engineer, the product manager, and the UX designer. They should work especially closely together to keep high engagement of UX (and others) - Sometimes UX designers and engineers don't get along; Possible solutions:
  - Try to get to the bottom of the disagreement, which is often about scope and not design.
  - Building trust over time between the two disciplines is critical.
  - Force collaboration early in the product development process. Make success a team goal.

Let's get started with our discussion!

Here is a sample of the emails that go out to roundtable attendees. Sam records a short video summary of the key points discussed on the roundtable.

**Subject Line:** UX Roundtable Event for B2B Product Leaders  
– February 15

Join us for our next UX Peer Roundtable event for B2B product leaders who are interested in sharing ideas on how to improve UX (no fee required).



Seating is limited for these small interactive groups, and we do it on Zoom – 60 minutes.

Our next meeting is on Wednesday, February 15 at 3:00pm ET. [REGISTER](#)

Below are the notes from our January 31 session.

[Click here](#) for my take on the session.



Sam is *positioning* himself as a ‘**SUPER REVENUE & PROFIT BUILDER**’ User Experience Consultant for software companies and backs that up with hard evidence that he produces *a lot* more revenue and saves *a lot* of money for his clients. He is striving to break out of the humble User Experience Consultant (*low fee*) file in his prospect’s brain, to move up to the *High-Level Expert* User Experience Consultant (*high fee*) file. It is very unlikely that his prospects will now dump him into the ‘*seen that done that*’ file with the herd of other user experience consultants that charge \$100 to \$150 per hour.

### **Where does Sam go next?**

There must be a lot of opportunity to generate leads for user experience consulting from AdWords and SEO. Once Sam starts to generate client engagements and revenue from the initial marketing we have been running, we can run a keywords analysis report to see what AdWords opportunities are available.

SEO would follow once we have figured out which Keywords are profitable for Sam.

Currently, Sam is reaching out to CTO’s and VPs of Product Development for his roundtables. We have discussed moving up to CEO’s, and President titles to see if Sam’s *positioning* of providing a more sophisticated revenue focused brand of User Experience consulting will resonate with those higher level senior decision makers.

## CHAPTER 12

# Real Live Example #3 of the Marketing & Sales Operating System in Action: BIM/CAD Working Drawing Outsourcing Consultant for Architects

This is another one-person company, but he has offshore teams in Serbia and the Philippines that produce the working drawings he delivers for architects. Here is a look at his business from the 10,000 ft. view when we started. The areas we had in place at the beginning of the program are highlighted in yellow. The areas that we are focusing on to implement and improve are highlighted in green.

Sales/Profit Growth 10,000 Ft. View - Which Direction?									
Current Customers	Marketing & Sales Improvement	# of Presentations /		New Customers/Year	Total Customers	Profit Improvement	Focus Areas	LibReme Profit/Customer	Annual Profit
		Year	Closing %						
100		100	20%	20	120			\$2,000.00	\$240,000.00
100	<b>CRM System + 10%</b>	110	20%	22	122	Customer Intake and Set Up + 2%		\$2,040.00	\$248,880.00
100	<b>Website + 10%</b>	120	20%	24	124	Service Delivery + 10%		\$2,244.00	\$278,256.00
100	Public Relations + 10%	130	20%	26	126	Employee Recruitment + 2%		\$2,288.88	\$283,998.88
100	<b>Referrals + 10%</b>	140	20%	28	128	Employee Training + 2%		\$2,433.32	\$307,625.47
100	Resellers + 10%	150	20%	30	130	Employee Retention + 2%		\$2,451.39	\$318,680.75
100	<b>Partners + 10%</b>	160	20%	32	132	Pricing + 10%		\$2,696.53	\$335,941.90
100	<b>Brochures, All cities + 10%</b>	170	20%	34	134	Accounting Systems + 2%		\$2,730.46	\$368,561.66
100	<b>Facebook + 10%</b>	180	20%	36	136	Customer Communication + 2%		\$2,855.47	\$381,543.83
100	<b>LinkedIn + 10%</b>	190	20%	38	138	Expansion of Services + 20%		\$3,447.11	\$533,301.20
100	Google AdWords + 10%	200	20%	40	140	<b>Reseller Partnerships + 20%</b>		\$4,376.53	\$612,714.50
100	SEO + 10%	210	20%	42	142			\$4,814.19	\$683,614.32
100	<b>Telemarketing + 10%</b>	220	20%	44	144			\$4,814.19	\$693,242.69
100	Trade Shows + 10%	230	20%	46	146			\$4,814.19	\$702,871.06
100	<b>Messaging &amp; Proof + 20%</b>	274	20%	55	155			\$4,814.19	\$747,161.57
100	<b>Email Lead Nurturing + 10%</b>	304	20%	61	161			\$4,814.19	\$773,735.87
100	<b>Lead Scoring + 10%</b>	334	20%	67	167			\$4,814.19	\$802,967.60
100	Telephone Intake + 2%	351	20%	70	170			\$4,814.19	\$819,045.06
100	Lead Response + 8%	368	20%	74	174			\$4,814.19	\$835,924.98
100	<b>Appointment Solidification + 20%</b>	479	23%	120	220			\$4,814.19	\$1,057,493.79
100	<b>Sales Presentation + 10%</b>	479	28%	132	232			\$4,814.19	\$1,115,037.54
100	<b>Sales Proposal + 10%</b>	479	30%	145	245			\$4,814.19	\$1,178,399.44
100	<b>Post Presentation Follow Up + 10%</b>	479	33%	159	259			\$4,814.19	\$1,248,097.33

The client had a decent website but no CRM. He obtained an email list of 80,000 architects and was emailing them using a mass emailing app. He is very effective at sales and quite comfortable following up on leads. He has used a combination of emailing with follow-up calling in the past so that is where we started with this campaign. His areas of strength are highlighted in yellow on the 10,000 ft. view.

Here is what the MS-OS plan looked like at the start of the set-up process.

## MARKETING & SALES OPERATING SYSTEM

### Resources

Website  
Zoom Info email list  
5345 LinkedIn connections  
Collateral that explains the Archline services  
Charles to deliver Events and sell

### Set Up

### Creative

Conduct client interviews & create interview collateral

### Emailing & Calling

Organize lists, create e-mail templates & call scripts  
Sort multiple opened emails from Zoom Info list

### LinkedIn

Sort qualified LinkedIn connections In Charles' Sales Navigator  
Modify Charles' LinkedIn profile to match campaign positioning  
Create banner in LinkedIn Profile  
Create Connection Message

Create LinkedIn Event Invitation Message

Create Event banner

### **CRM/Email Automation**

Create custom fields

Create Lead Groups

Create workflows

Create Event Email Invitation (this goes to Zoom Info email list)

Create 2nd Email Event Invitation Message

Create Event Attendee Email Template

Create Event No-Show Email Template

Create Telemarketing Reports

Create Telemarketing Emails

### **Calendly**

Schedule Event meetings

Create Event Description

Create Event 1 day, 1 hour, 15-minute reminders

### **Roundtable Prep**

Create Event slides & presentation notes

Conduct Event Prep Session with Charles

### **Zoom Meetings**

Calendly is synched with Zoom

## **Implementation**

### **LinkedIn**

Send Event invitation message to current connections

Register prospects for Event in Calendly

### **Mass Email**

Schedule email blasts and upload multiple click lists to CRM

### **Calendly**

Clone Event-description, reminder emails

### **CRM/Email /Automation**

Upload contacts with email only to CRM (multiple opened from Zoom Info list)

Event Registrants & Attendees are moved into CRM

send Event invitation 1, 2 to email list

Send Event Follow Up Email to Attendees

Send Event Follow Up Email to No Shows

### **TELEMARKETING**

Call multiple clicked leads, leave Charles vm and book for one-one or event

Call Event no shows to re-register for next event or one-one

Call Event attendees to schedule one-one calls with Charles

Follow up calls to one-one meeting leads

### **SALES ACTIVITY**

Conduct Roundtable events

Conduct one-one meetings & sales follow up

Sales Follow Up Calls to high interest leads

We interviewed four of their clients to create the proof. During the interviews, in addition to very positive comments from all of the clients we interviewed, some critical feedback was offered by the clients, when we asked them where our client could improve. Even though all of the clients were pleased with Archline's level of service, one had specific concerns. Because our client was essentially a one-man operation and all client communication



flowed through him, what if something happens to him? What if he gets sick or overloaded with too many clients?

Our client carefully reviewed the interview transcript and responded to the client's concerns.

## **1. Quality control**

Responding to everything you said, Nick and I both understand that doing our work for you in a timely and competitive manner is certainly important, but quality is even more important. We are constantly striving to improve the quality of our work via strengthening and training staff and continuing rounds of quality control reviews.

## **2. Staff consistency**

To the greatest extent possible, production staff is being kept consistent. Having the same team members working on your projects over time is resulting in an ever-increasing understanding of your expectations, and what needs to be done to achieve higher quality work with decreasing need for micro-management and supervision. Our team is becoming better able to get it right the first time it is done. We are aiming to keep that as an increasing trend. I am also looking at the possibility of adding a consulting quality control manager to our team. I am considering several candidates now who would be brought in at carefully selected review points during production.

### **3. Data Access**

You indicated that you want a high level of fluid, continuous and secure access to the data for all your projects, and you are considering multiple ways to accomplish this. Whatever approach you choose, we will adopt with you.

Responding to your concerns for access, we can improve that by making daily copies of your Revit data available, giving you up-to-the-day latest data in the event something catastrophic might happen to our data or to either Nick or me.

### **4. Communication Tools and Data Protection**

There are numerous communications tools available, some of which we are using now, including Dropbox, and Bluebeam. We could also use Logmein, and any other resources you might chose, such as BIM360. As the volume of our work for your firm might increase, we could consider adding additional managers from the production team to participate in or at least listen in to periodic or special milestone online sessions, which in many instances could make the communications links between all of us more efficient.

### **5. Training sessions and Revit standards**

As of last week, we now have completed one session presented by Peralax, sharing with us comparisons of Linked Revit files with data that might be held inside one main file as Groups. Whatever you decide internally, we will follow. We guess it is too early to give you any feedback, so we will keep attending those sessions and keep the notes so we can give you some

comments when you ask for them. Nick has suggested that selected members of his team be invited to attend these sessions.

## **6. Involving us in the concept stage**

You could save a considerable amount of time and effort on your part by providing us with hand sketches and/or dwg or Sketchup files from which we would commence every project. You have already done this with a couple of projects.

Regarding the possibility of having us involved with you in the design of your projects, we have strong design skills that we have not had the opportunity to demonstrate to you yet. We would like an opportunity to show you what we can do, not just for building design but also for land and urban planning.

## **7. Our capacity possibilities**

As the volume of work with FK grows, so does our team. We are in a constant search for new staff. The awareness of people resources is growing over time. As you expand your production needs, we will expand, too.

## **8. Financial risks**

You mentioned your concern about our financial risks in taking on larger volumes of work, such as possibly double or triple what we have been handling to date. We can figure out ways to manage that. To date, Nick and I have been operating based on our own individual strengths, financially. It's been a while since I have done this, but in the past, I was able to obtain lines of credit based on the strength of signed agreements with

responsible clients like your company. This was a revolving line that fluctuated up to a pre agreed on maximum, including an understanding that I would clear out the balance at least once per year for 30 days. I don't see us doing anything like that right now, but it certainly is an option if necessary.

## **9. Internal improvement/training**

Teaching is an integral part of the process of achieving ever higher levels of quality, faster production, and lower more competitive costs.

Additional explanatory notes added to the markups, illustrating why something is being done in a particular way, is a gold mine for the team. You have done this, and it is really appreciated. Nick and I are constantly sharing information about materials and methods of construction, and Nick conducts internal education sessions for his team a couple of hours each week, teaching them about various parts of the projects.

Nick and his team are using a variety of resources, such as old movies from You Tube, the book of Architectural Graphic Standards, various internet resources as needed, etc.

## **10. Conclusion**

This concludes everything Nick and I have reviewed, concerning your interview with David Rankine. Nick and I both appreciate the time and the thoughts and comments you shared with David. It is a tremendous help in showing us how we can do better for you and your colleagues. It is a pleasure working with all of you and we are looking forward to stepping up to the

challenges and building an even stronger relationship with you and your team going forward.

At the time of the interview, Archline was handling two projects for this client. Since that time, they have been given an additional 33 projects. They asked their clients if they had any areas of concern and then pro-actively worked on addressing those concerns, communicated that to the client, and got more projects.

We created a series of emails which incorporated the most powerful emotionally compelling quotes from these client interviews. Here is a sample of one of those emails.

**Subject:** How Archline Provides On-Time Accurate Working Drawings for Studio 951 Architects

***Archline*** delivers high-quality - deadline beating Working Drawings for big log jam constrained projects. We also do small projects. Pay when we're done, and you're happy. We have helped our other architect clients meet some unbelievably improbable challenges. We can also function as a continuing key partner for the people managing your projects.

**Here are excerpts from a recent interview with Dave Johnston of Studio 951 Architects.**

***How did you engage Archline's services?***

*Archline handled construction documents on some multi-family building projects for us. Our staff were feeling overwhelmed, so I was trying to come up with an avenue that they could possibly outsource some of the work. We had never outsourced before, so it was a bit of a risk for me.*

***Were you satisfied with the work performed by Archline?***

*I think they did a very good job. They maintained the price that was quoted in the proposal for the duration of the project and met all timelines. Overall, we got a good return on our investment in outsourcing the work to Archline.*

***Would you utilize their services again?***

*Yes, because they met our schedule / timeline and maintained the quoted price, I would definitely engage with them again.*

***What would you say to other architectural firms who are contemplating having a remote team handle their drawings?***

*I would recommend to other firms that if they need to outsource, that Archline would be a great company.*

We have a great team of talented architects and engineers who deliver world class working drawings. Contact me to arrange to see samples of our work, pricing, etc.

Best regards,



Charles Traylor, Architect, NCARB  
15950 Dallas Parkway, Suite 400  
Dallas, Texas 75248  
Telephone: (214) 304-2850  
Cell: (808) 747-4460

### **Implementation:**

We started with mass emailing and outbound calls to high probability prospects who opened the email more than once, indicating that they had a strong level of interest.

After successfully running the combined emailing and calling segment of the campaign for two months, we added Peer Roundtables into the campaign. We sent invitations to Charles's LinkedIn connections using the Event app in LinkedIn.

Here is the first Roundtable event invitation. The invitation banner incorporates **Need** – Big working drawing log jams, **Trust** – other architects are attending, and **Curiosity** – How are other architects solving the working drawing problem?

## Solving Big Working Drawing Log Jams



Discuss how to solve critical issues facing other Architectural firms around delivering Working Drawings fast and cost-effectively



The roundtable meetings allow Charles to meet with prospects in an intimate small group setting in Zoom to talk about how they are trying to solve big working drawing log jams, which is the main problem that Archline solves for their clients.

After three months, we decided to change up the roundtable. Here is the 2<sup>nd</sup> roundtable event invitation. We will continue to come up with new roundtable topics.

## Double Your Compensation per Project with Proper Clash Detection & Conflict Resolution



**Architect Roundtable Discussion & Workshop**





By introducing Clash Detection and Conflict Resolution, Archline is offering an additional service which will help them grow their client base at the same time they are growing the lifetime value per client.

We also created an information booklet that can be mailed or couriered to high value prospects.

The information booklet will strengthen the prospect's perception of Archline and secure more sales meetings, as well as helping convert a higher percentage of sales meetings to clients.

Charles also came up with the idea of interviewing other architects to create more content for our lead nurturing email sequence where we are trying to stay in front of our prospects and continue to build trust with them. This interview series is called 'Meet the Architect.'

Here is the 1st video interview in the Meet the Architect series.

<https://www.youtube.com/watch?v=6Jbmoe2XE6U>

## Where does Charles go from here?

Charles realizes that he has a huge opportunity to expand his business, but he knows that he can't do it all by himself. Currently, he is in the process of finding other architects to partner with so they can perform the same role that he does, meeting with prospective clients and overseeing the production teams that are delivering the working drawings. When he adds each new partner, we will simply add them into the MS-OS.

Recently Charles and two of his new affiliate partners attended a conference in Chicago where they were able to meet several qualified prospects from large architectural firms. They also arranged to interview two panels of architects while they were at the conference and those interviews will be part of the *Meet the Architect* video series.

All of these new prospects will be entered into the follow up email sequence in the CRM so that we can stay in front of them consistently to make them feel like they are part of the Archline family.

We will continue to build more lists of qualified architect contacts from LinkedIn and invite them to LinkedIn roundtables and put them into the sequence of *Meet the Architect* emails.

When we identify a particularly good prospect, we can invite them to be interviewed by Charles for the *Meet the Architect* series. This will give Charles an opportunity to build trust with them at a much deeper level which will undoubtedly result in even more large long-term clients for Archline.

The MS-OS will continue to bend and flow *in synch* with Charles and his new affiliate partners, helping them move Archline towards more clients, greater lifetime client value, and *more profit!*

## JOE'S FINAL ADVICE

The goal of this book is to give you a simple road map to more *profitable* marketing. Here is a recap of what you need to focus on to *accelerate* your sales and profit.

You have to stop seeing your marketing as a bunch of activities and programs. It is a *system* whether you want it to be a system or not, and regardless of whether you have a very efficient marketing system. Marketing is a systematic series of steps that leads to sales. A better marketing system = more sales.

Automate as many steps as you can in your marketing and sales process. Design your marketing and sales system to *fit* your team and make sure that it is built so that it can quickly adjust to changing circumstances for your team members and changing market conditions.

You can't keep jumping from one marketing program or strategy to the next every 30 to 90 days. All marketing works, you just have to do it consistently. Pick one or two marketing strategies that your budget can handle comfortably and stick with them.

Be laser focused on increasing the lifetime value of your customer by increasing your fee and/or increasing the amount of revenue you generate from each customer. You don't necessarily have to deliver more products or services. You can resell other

company's products or services or refer them to your customers for a commission.

Take a longer-term view of the lifetime value of your customer. If you look down the road a few years, you will probably see a pretty nice profit for each new customer coming into view.

Don't look like the rest of your herd. Avoid getting dumped into your prospect's '*Seen that Done that*' file. Think about how to '*position*' your marketing, to move your company far away from the rest of your herd.

To avoid the '*Seen that Done that*' file, keep your initial marketing messages short and inject them with Curiosity, Trust and Emotion. *Always* be wary of the 'seen that done that' file at every stage of your marketing and sales cycle. In order to want to take the next step, your prospect always has to feel that there is something *new* and *exciting* in store for them when they take that next step.

Get right to the heart of what your prospects want to see in your marketing – what *moves* them. Use short *emotional* quotes from your client interviews front and center in all of your marketing messaging.

Get out of your head and into the head of your prospect- all the time! Your marketing should be all about *them*. *Their* feelings, *their* thoughts, *their* fears. The best way to discover what the thoughts and feelings of your prospects are, is to interview your clients to find out what their thoughts and feelings are.

Realize that your own narrow view of what makes good marketing is just that – *your own narrow view*. Get out of your Marketing Silo.

Find the cracks in your marketing system and fix them or find somebody who can see them and fix them.

*Your marketing doesn't have to be perfect. All marketing works -you just need to do it consistently!*

***Joe Prospect***

PS: Go to <http://www.joeProspect.com/workshop> to reserve a spot in my free marketing workshop.