Boot Camp 2017:

Marketing Automation

How To Use CRM, Workflow And Online Automation
Tools To Put Your Client Acquisition Efforts On Autopilot

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How Many Of You Accounted For...

- Lead Generated, No Appointment

Lead Generated, No Appointment

You PAY for every inbound call in REAL dollars. Every call is either handled properly **or burned**. A burned lead REMOVES money from your business, your income and, ultimately, your personal net worth.

How Many Of You Accounted For...

- Lead Generated, No Appointment
- Appointment Scheduled, But Not Kept

Appointment Scheduled, But Not Kept

Broke and struggling business owners are always counting on the "buy now" crowd. **Successful** business owners get the "buy now" business <u>AND</u> capture and cultivate leads into buyers over time (list-building, drip marketing).

How Many Of You Accounted For...

- Lead Generated, No Appointment
- Appointment Scheduled, But Not Kept
- Appointment Kept, No Sale

Appointment Kept, No Sale

The prospect goes silent or tells you they need to think it over; do you just roll over and take the "NO"?

Just like leads that are burned, sales that aren't closed due to a lazy salesperson, no sales process, no management and no follow-up are akin to taking THOUSANDS of dollars and making a bonfire in your parking lot.

How Many Of You Accounted For...

- Lead Generated, No Appointment
- Appointment Scheduled, But Not Kept
- Appointment Kept, No Sale
- Sale, But Not The Premium Package

Sale, But Not The Premium Package

The EASIEST money you'll ever make is expanding the relationship you have with an existing client. If you won't do the EASY money work, how are you ever going to get good at the hard stuff?

EASY MONEY

Sales Funnel KPIs:

- **Leads**
- **Appointments (First One)**
- **Proposals**
- **Sales Closed**
- **Average Sale (Dollar Amount)**

Sales Funnel Averages From
A Poll Of 100 MSPs

- **New Leads: 72** (6 Per Month)
- **Appointments Sat: 35** (3 Per Month Or 48% Of Leads)
- **Proposals Generated: 24** (2 Per Month Or 69%)
- **Closed Deals: 12** (1 Per Month Or 50%)
- **Average 1st Year: $25,119.32**
- **Total Annual Payout: $301,431.84**

The Magic Of Small,
Incremental Improvements

- **New Leads: 79** (10% Increase From 72 Leads Per Year To 79 Leads Per Year)
- **Appointments Sat: 47**
  (10% Increase From 48%; Now 58% Of Leads Turn Into An Appointment)
- **Proposals Generated: 37**
  (10% Increase From 69%; Now 79% Go To Proposal)
- **Closed Deals: 22**
  (10% Increase From 50% Close; Now 60% Close)
- **Average 1st Year: $27,631.25**
  (10% Increase In Average 1st Year Spend Of $25,119.32 To $27,631.25)
- **Total Annual Payout: $607,887.50**

For The Record, That's A

$306,456

Difference!!!

$306,456 MORE

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3 Things To Plug ALL Of The Holes In Your Bucket:

- A documented process.
  There is a right way to do anything; professionals don't "wing it."
- Accountability and management.
  Resistance to accountability reveals a desire for sloppy performance, lack of professional integrity and a desire for an easy, low-pressure job (reward without achievement).
- **Automation tools.** *You cannot easily organize, manage and measure your marketing and sales process manually.*

The purpose of creating a system is

NOT TO SIMPLIFY

your business or operation; the purpose is to:

1. **INCREASE output (results)**
2. **DECREASE "raw materials"** (people/money/effort)
3. **Drastically reduce variables**

But There Is

Good News!

Good Systems Supported With **Automation Tools** Allow You To Reduce Variables, Get MORE Done With Fewer People, Avoid Dropped Balls AND…

Make

MORE
MONEY!

(With A LOT Less People)

So You Don't Have To Hire THIS Guy

Or This Guy...

Or This Guy...

MSP
Contract

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3 Marketing Automation Tools You Cannot Live Without (And 3 You'll Want)

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3 Marketing Automation Tools You Cannot Live Without
(And 3 You'll Want)

1. CRM (Customer Relationship Management)

2. Online Calendar (Appointment Core)

3. Dialer (Has To Integrate With CRM)
   - A Shopping Cart
   - An Integration Tool For Surveys (Zapier)
   - And Integration Tool For Webinars (PlusThis)

Come Back Tonight At 8:00 P.M. For A
Closer Look