

# Generate More Leads

## How to Refine your Lead Processes



# Company Goals

Where are you now? Where do you want to be? How will you reach your goals?



## Considerations

1. Your perfect customer
2. Customer growth now
3. Customer acquisition now
4. Cost of acquiring a new customer
5. Target growth for this year
6. Actual growth last year

# Essential Tools for Growth



## 1. Call Customers & Prospects

Grows your prospect list, increase purchases

## 2. Send Emails

Increase how often your customers purchase

## 3. Website Tracking

Identify website visitors, so you can call them

## 4. Customer Surveys

Pinpoint problem areas, increase retention

## 5. Key Metrics Tracking

Identify purchase patterns on a rolling  
12-month basis

Identify customers who haven't purchased for  
sales reps to contact

# Marketing that Helps You Grow

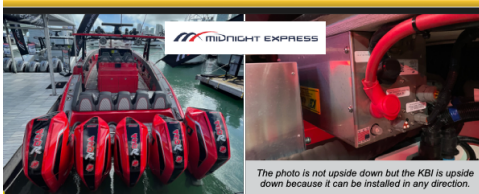


Goal	Marketing Activity	Typical Improvement
<b>Increase Order Frequency</b>	<b>Emails</b> remind customers to purchase more often	<b>2 – 3x increase</b> in purchase frequency
<b>Increase Revenue</b>	<b>Calling</b> prospects and customers expands your list by confirming and adding decision makers	<b>60%+ increase</b> in customers' purchases by calling them
	<b>Emails</b> introduce new customers to your company	<b>Qualified leads</b> for sales reps through open reports
<b>Improve Customer Retention</b>	<b>Customer Satisfaction Surveys</b> improve customer retention	<b>30%+ increase</b> in customer retention

The impact is monitored by reviewing your invoices each month.



We Are The Expert Leader In Engine Starting Solutions



The photo is not upside down but the KBI is upside down because it can be installed in any direction.

### The KSM Comes Standard on All Midnight Express Boats 43' and Over

To ensure they start every time

When you're out on the water, knowing your boat will start gives you peace of mind. That's why Midnight Express is adding our KSM supercapacitor on their boats. It can be installed in any direction and will ensure the boat starts, even with dead batteries!

Midnight Express even had a KSM installed on several of their boats that were on display at the International Miami Boat Show!

Why Use the KSM



### Why Our Customers Choose the Mini HD

TowBoatUS

"We bought a Mini HD to keep in our shop, and it works great. It's much better than your traditional jump starters that you have to plug in and recharge. I don't do many jumps to begin with, but when I do, the Mini HD works. It's lightweight and in a waterproof case, so when someone needs a jump, I just grab it and go. I would definitely recommend the Mini HD."  
—George Campanile, TowBoatUS Cape May

"We bought the KBI Mini HD for its state-of-the-art technology. The 90 second recharge definitely saves me time, and I would recommend it to others in the industry."  
—Rob Butler, TowBoatUS San Diego

Order Your Mini HD Now

## Send Emails

Consistent contact through emails reminds customers and prospects what you offer. Include every category of products and services that you can provide. Add best practices for your customers' industry and customer testimonials for your business.

## Results

- **Customers purchase more often** when they receive emails from you regularly.
- **Prospects remember you** and purchase when you remind them what you offer.
- **Open reports** show who opens your emails and how often. The sales team follows up with anyone who opens an email 3+ times.

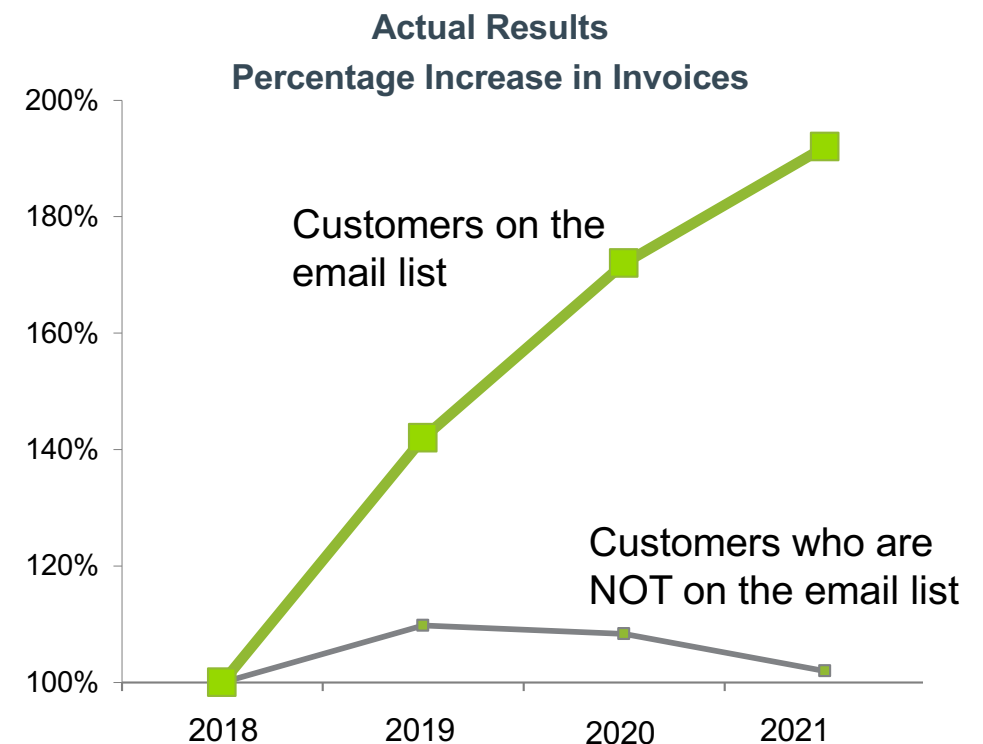
*How are you staying in touch with your customers?*

# Why Emails Work

Customers on the email list purchase two to three times more often than customers who are not receiving emails.

## Remind Your Customers to Purchase

- Publicize *all* of your products and services
- Look professional and consistent
- Distribute emails on schedule
- Position your company as the authority



# Why You Should Call Prospects to Build Your List

It's important to call companies who look like your customers to identify decision makers and gather their emails to build your list. Letting them know you offer products and services they need will help them switch to you when their current provider fails them.



## Results

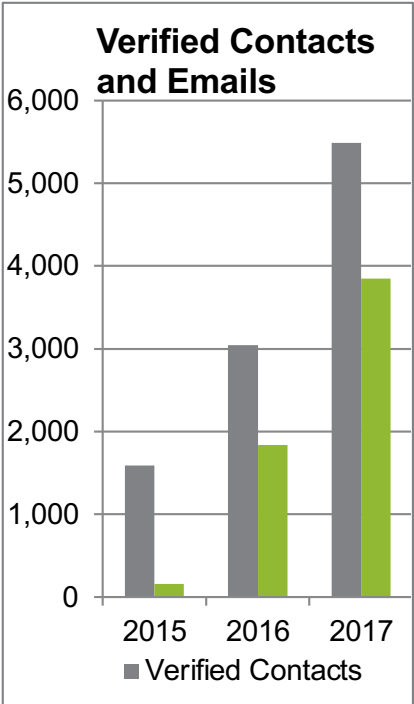
- **Your email list grows** consistently with continuous calling each week.
- **Prospects are identified**, including names of decision makers
- **When personnel** change, your records stay current.
- **Target industries** should be identified by looking at your customer list to see what other companies look like your customers and are within a geographic area that is feasible.

# Calling and Database Management

Calling identifies decision makers and gathers their contact information, including email address. Send offers via email after confirming the email address, and assign the correct industry after confirming what type of business they are in.

## Keep Lists Current, Add Prospects

- **Current customers**—Call through invoice lists to add emails
- **Prospects**—Add specific industries and determine the decision makers to add to your email list
- **Send information about your company, and ask about their needs**—Generate leads



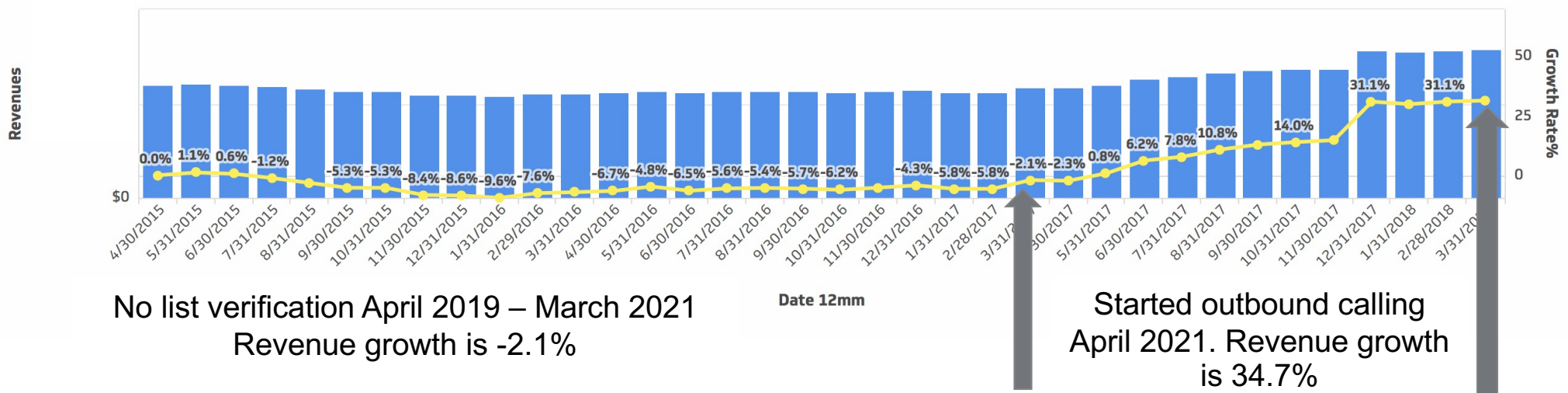
Industry	Total Market
Dog & Cat Food Mfg	193
Cereals Mfg	73
Bread & Bakery Products	1,452
Food Products Mfg	2,240
Candy & Confectionary Mfg	674
Frozen Food Mfg	296
Prepared Fish & Seafood Mfg	400
Physicians & Surgeons Equip	4,167
Surgical Instruments Mfg	93
<b>TOTAL</b>	<b>9,588</b>



# How List Updates Can Impact Your Revenues

Emails encourage both existing customers and prospects to purchase more often. They are reminded of your company when they receive your emails.

One company was sending emails without list expansion, and their revenues were flat. Once they started calling customers and prospects, their revenues increased 34.7% in the first year.



# How List Updates Can Impact Your Revenues

Existing customers purchase more often when they are reminded of your company by sending emails regularly. Prospects become familiar with your company through emails.

The same company that was sending emails without list expansion saw their revenues/account increase by 27.4% in the first year, after they started calling.



No outbound calling April 2019 – March 2021  
Revenues/account fell -3.5%

Added outbound calling  
April 2021. Revenues/  
account grew 27.4%

# Identify Website Visitors

Capture information from your website visitors using SharpSpring.

## Identify Visitors

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- Receive a daily report with website visitors
- Collect contact and profile information with offers
- Track activity of identified visitors
- Link revenue to marketing efforts
- Reallocate your budget based on what is working



# Website Chats and Form Fills

Capturing website visitors is an important component of the sales process.

## Engage Visitors

- **Send automated, personalized emails** to anyone who fills out a form on your website
- **Information from the form is sent automatically sent to sales reps** via emails and/or texts with lead scoring data for follow up

The screenshot displays the Highland Machine website. At the top, there is a red navigation bar with the phone number 618-654-2103 and a 'REQUEST A QUOTE' button. The main content area features a video player with a play button and a share icon. The video title is 'Highland Machine | End To End Manufacturing and Sheet Metal Fabrication'. Below the video, the name 'Bill Sullivan' and title 'President/CEO' are visible. A chat widget is overlaid on the bottom left of the video player, titled 'Ask a Question!'. It contains two pre-set questions: 'Are you looking for help on a new project?' and 'What can I help you with?'. Below these are three response buttons: 'I have a question about pricing', 'I want to learn more', and 'Just taking a look around'. A green arrow points from the chat widget towards the video player.

# Customer Satisfaction Surveys

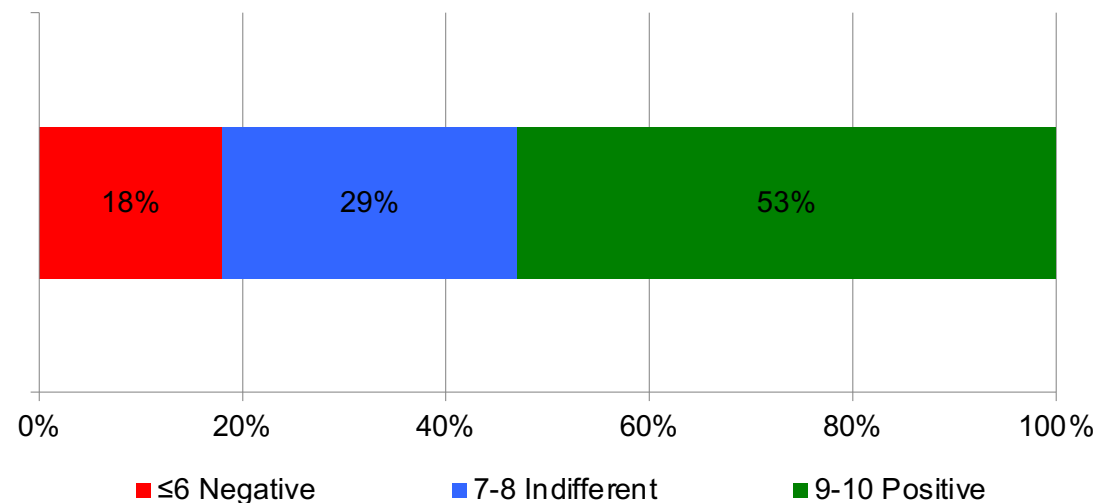
Call customers who purchased within the last 30 to 60 days. Ask them “How likely are you to refer our company to friends and colleagues, on a scale of 0 to 10?” Then ask, “What could we do better?”



## What Will Improve?

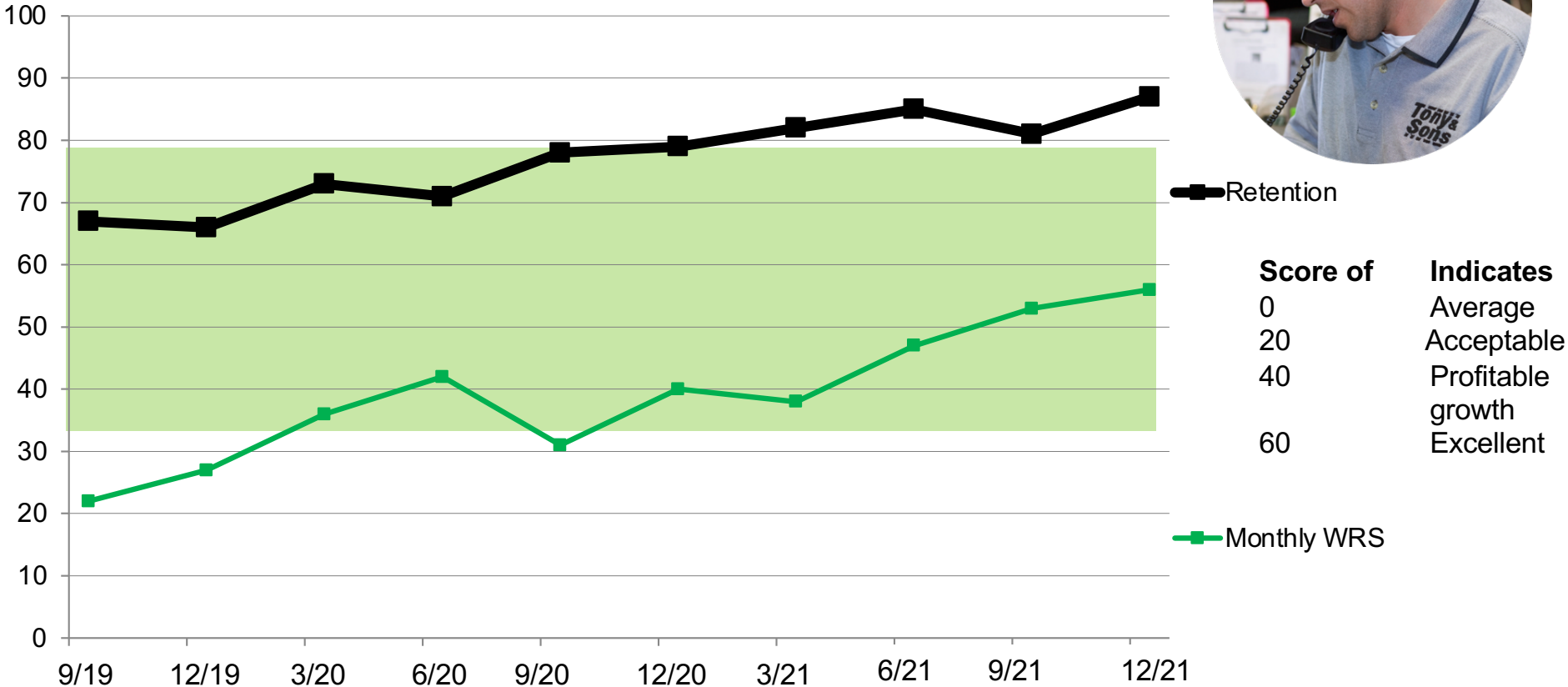
- You’ll identify problems in your organization, so you can solve them quickly
- Keep customers from leaving when you thank them and fix their issues
- Increase customer retention by 30%+

**% Positive Responses - % Negative Responses = WRS**  
**53 – 18 = 35 NPS®**



# Customer Satisfaction Scores Affect Retention

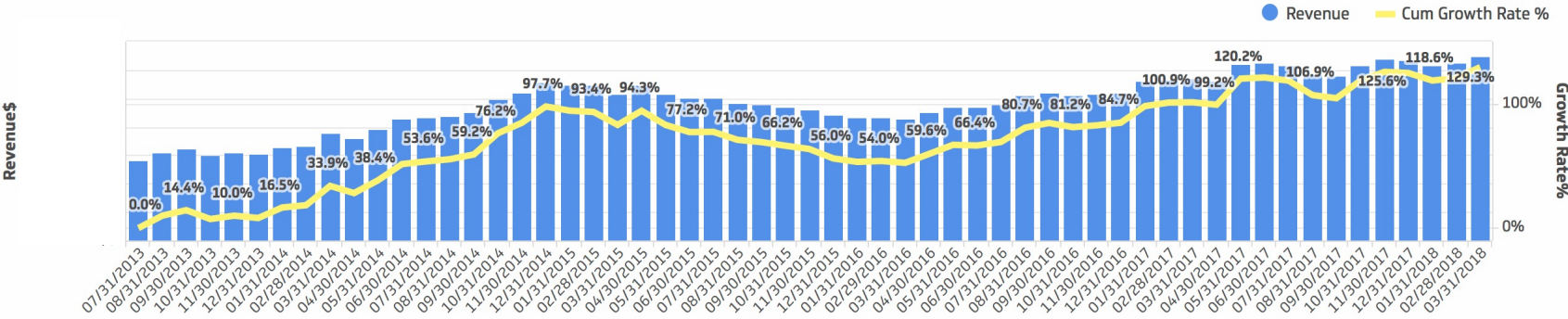
As this client's WRS score increased from 21 to 57, their customer retention rate grew from 67% to 88%.



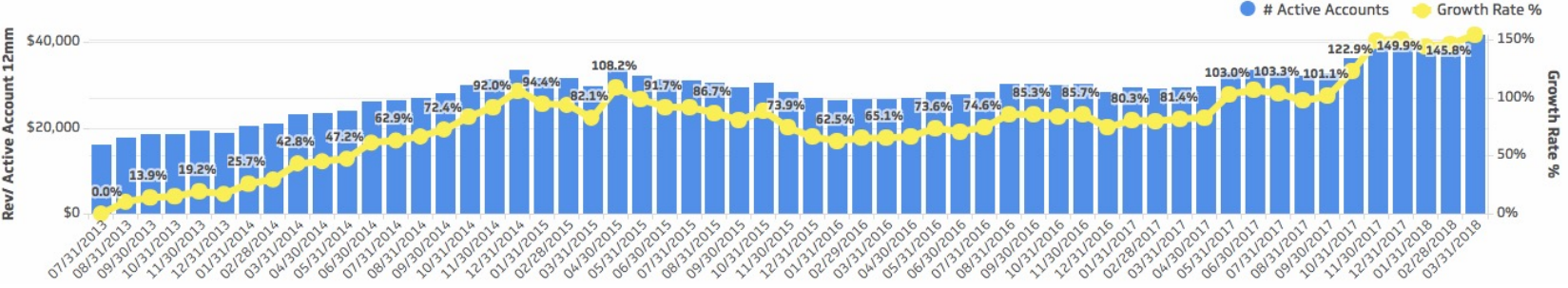
# Key Metrics – Rolling 12 Month Reports

Look at your 12 month rolling revenues and revenues for customers, so you can identify trends. The 12 month rolling average removes any seasonal fluctuations.

**Revenue Growth**, by rolling 12 months is 15.1%



**Growth in revenue per active account**, by rolling 12 months, is 39%, and **average revenue per account** is \$41,650



# Key Metrics – Last Purchase Timeframe

Check when customers purchased last for your sales team. Show customers with their last purchase date, by sales rep, so they can call anyone who has lapsed.

Adjust last purchase period

Customer	City	State	Rev Rolling 12 M...	Rev Prior Rolling...	Order Freque...	Order Freque...	Status	Last Purchas...	Sales Rep
			\$557,614		3		At Risk Level 2	9-12 Weeks	Sales Rep
			\$343,603		3		At Risk Level 2	9-12 Weeks	
			\$248,541		1		At Risk Level 2	9-12 Weeks	
			\$242,706	\$24,292	2	4	At Risk Level 2	9-12 Weeks	
			\$226,470		3		At Risk Level 2	9-12 Weeks	
			\$151,325	\$10,630	4	6	At Risk Level 2	9-12 Weeks	
			\$132,108		3		At Risk Level 2	9-12 Weeks	
			\$122,773	\$52	6	1	At Risk Level 1	9-12 Weeks	
Customer name	City	State	\$107,196		2		At Risk Level 2	9-12 Weeks	
			\$106,653		3		At Risk Level 2	9-12 Weeks	
			\$99,187	\$8,758	11	5	At Risk Level 1	9-12 Weeks	
			\$97,807		2		At Risk Level 2	9-12 Weeks	
			\$89,543	\$8,001	11	1	At Risk Level 1	9-12 Weeks	
			\$78,206		3		At Risk Level 2	9-12 Weeks	
			\$45,158		10		At Risk Level 1	9-12 Weeks	
			\$36,080	\$19,236	6	2	At Risk Level 1	9-12 Weeks	
			\$32,087	\$52,924	61	26	At Risk Level 1	9-12 Weeks	
			\$31,361	\$61	12	1	At Risk Level 1	9-12 Weeks	
			\$27,818	\$9,955	23	6	At Risk Level 1	9-12 Weeks	
			\$25,685		7		At Risk Level 1	9-12 Weeks	



# Marketing Results: Leads for Sales Reps

Many of the marketing efforts produce leads directly for the sales reps

Customer	City	State	Rev Rolling 12 M...	Rev Prior Rolling...	Order Freque...	Order Freque...	Status	Last Purchas...	Sales Rep
Report: Customer name 12 month purchase amount Last purchase date Order frequency Sales Rep			\$557,614		3		At Risk Level 2	9-12 Weeks	
			\$343,603		3		At Risk Level 2	9-12 Weeks	
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## Sources of Leads

- Email open reports
- Contacts from calling
- Inactive customers
- Website visitors
- Unhappy customers

### Website Visitors

LEADS			
1		<b>Henry Sommer</b> Last on Wed, Feb 4th at 12:19 pm 717 3824793 hsommer@zoominternet.net Web: zoominternet.net	NEW 7 Pages
2		<b>Randy Tomlinson</b> Last on Wed, Feb 4th at 1:16 pm 6088425418 randyt@demco.com Web: demco.com	NEW 3 Pages
3		<b>Randy Tomlinson</b> Last on Wed, Feb 4th at 1:16 pm 6088425418 randyt@demco.com Web: demco.com	NEW 3 Pages
4		<b>Mac Cook</b> Last on Wed, Feb 4th at 5:36 am mac.cook@veritivcorp.com Web: veritivcorp.com	1 Visit 2 Pages

### Email Open Report Information

- Email address
- Opens
- First name
- Last name
- Company
- Phone
- Email list



# Generate Leads

Goal	Services	Typical Improvement
<p><b>Increase qualified leads for your sales team</b></p>	<p><b>The SharpSpring web tagging program</b> notifies you when someone visits your website, so you can call them quickly.</p>	<p><b>Sales reps quickly become inundated with qualified leads.</b></p>
	<p><b>Email open reports</b> show who is interested in your emails.</p>	
	<p><b>Calling</b> produces hot leads looking to purchase.</p>	
	<p><b>Key metrics reports</b> provide details by sales rep for customers that haven't purchased within the past 8 weeks.</p>	
	<p><b>Customer satisfaction surveys</b> identify unhappy customers. Calling them and fixing their problem prevents them from leaving.</p>	

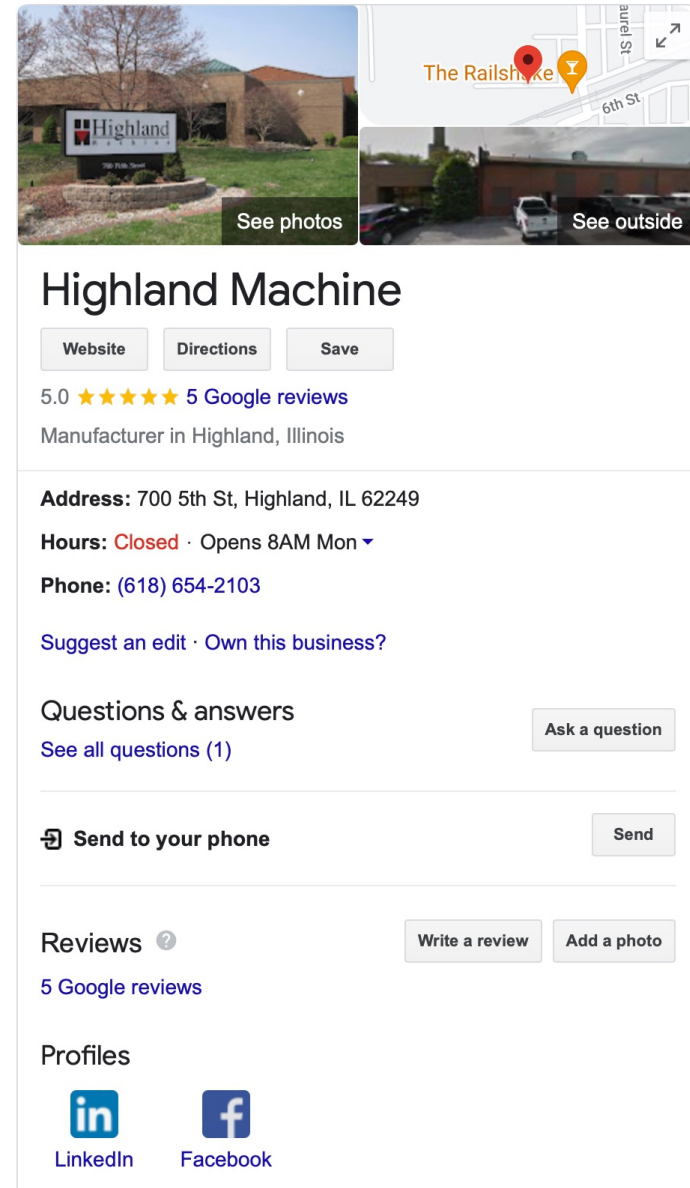


The KPIs are monitored by reviewing the company's invoices each month.

## 1. Your Google Listing

### Is everything correct?

- Have you added the hours you're open?
- Do you have reviews?
- Are your social media accounts set up?



The screenshot displays a Google Business Profile for 'Highland Machine'. At the top, there are two photo thumbnails: one of the building's exterior with a 'See photos' button, and another showing the street view with a 'See outside' button. A map snippet shows the location at the intersection of 6th St and Aurel St, with a red pin and a yellow location marker. Below the photos, the business name 'Highland Machine' is prominently displayed, followed by buttons for 'Website', 'Directions', and 'Save'. The profile features a 5.0-star rating from 5 Google reviews and is categorized as a 'Manufacturer in Highland, Illinois'. Key information includes the address '700 5th St, Highland, IL 62249', hours 'Closed · Opens 8AM Mon', and phone number '(618) 654-2103'. There are links for 'Suggest an edit' and 'Own this business?'. The 'Questions & answers' section shows one question with an 'Ask a question' button. A 'Send to your phone' button is also present. The 'Reviews' section shows 5 Google reviews and buttons for 'Write a review' and 'Add a photo'. At the bottom, social media profiles for LinkedIn and Facebook are listed.

## 2. Website

When looking for products, 80% first search the web. A professional, looking, well organized website, optimized properly and updated often, will assure your visibility. Content is key.

### What's Important

- It should be obvious what you do at first glance.
- It must be easy to navigate quickly, so visitors can find what they are looking for
- Your website needs to look modern and up to date!
- SEO should be updated routinely as part of a website maintenance program
- Use Google Analytics regularly to see how your website is performing



# 3. Company Materials

Professional materials must communicate all the products and services you offer. They need to present a consistent image for your company.

## Showcase Your Products and Services

- **Customers buy more** when they know what you are selling
- **Sales presentations are consistent** and comprehensive
- Both employees and customers understand everything you offer

### The Industries We Serve

Our team manufactures a wide variety of products, including medical noninvasive devices, electrical and HVAC components, vehicle hose ends, high current battery housings, gearbox mechanisms, turbine housings, transmission parts, valves, impellers, pumps, seals, and more. Below are some of the industries we work with.

- US government
- Defense contractors
- Electronics manufacturers
- Aerospace
- Off highway / construction
- Marine
- Agriculture
- Valve manufacturers
- Chemical
- Communication components HVAC
- Unit components
- Commercial vehicle hose ends
- High-current battery housings
- Precision fastener products
- Gear box mechanisms
- Consumer electronic components

aztecplastic.com (312) 733-0900

### Our Capabilities

### The Materials We Use

Aztec specializes in working with resins that are difficult to mold. These industrial polymers are ultra engineering grades that have high strength and often replace metal parts. Below are examples of the materials we use in producing these parts.

- Valox
- Ketaspire
- Avaspire
- Primospire
- ABS
- PPSU
- LCP
- PPS
- Xytel
- Noryl GTX

## Molding the Future of Plastics

Plastic Injection Molding & Machining,  
Contract Manufacturing, and Assembly

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## 4. Social Media



Have you set up your social media accounts?



### Social Media Accounts Boost SEO

- Customers who are active in social media are reminded of your company with every post
- Employees feel as though they are a part of something much bigger when they are involved with social media posts
- Social media activity boosts your SEO rankings, so your website is more visible

## 5. Google AdWords

Google AdWords can help targeted customers find your website.



### It's Easy to Test

- Choose a budget
- Select keywords to target
- Tie in phone numbers to measure the results
- Record the calls

