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
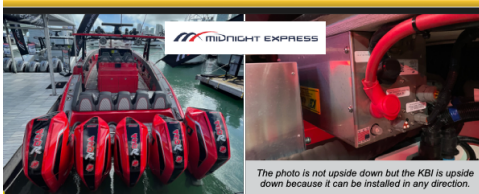sales reps to contact

Marketing that Helps You Grow

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

The impact is monitored by reviewing your invoices each month.

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

Actual Results
Percentage Increase in Invoices

Customers on the email list

Customers who are NOT on the email list
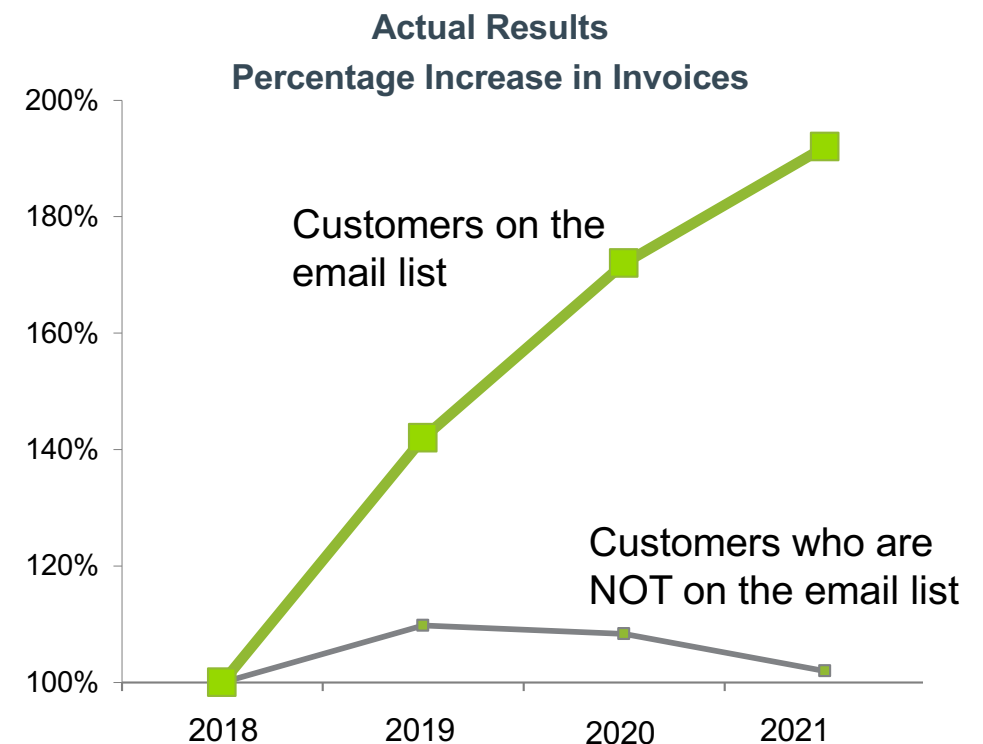
Why You Should Call Prospects to Build Your List

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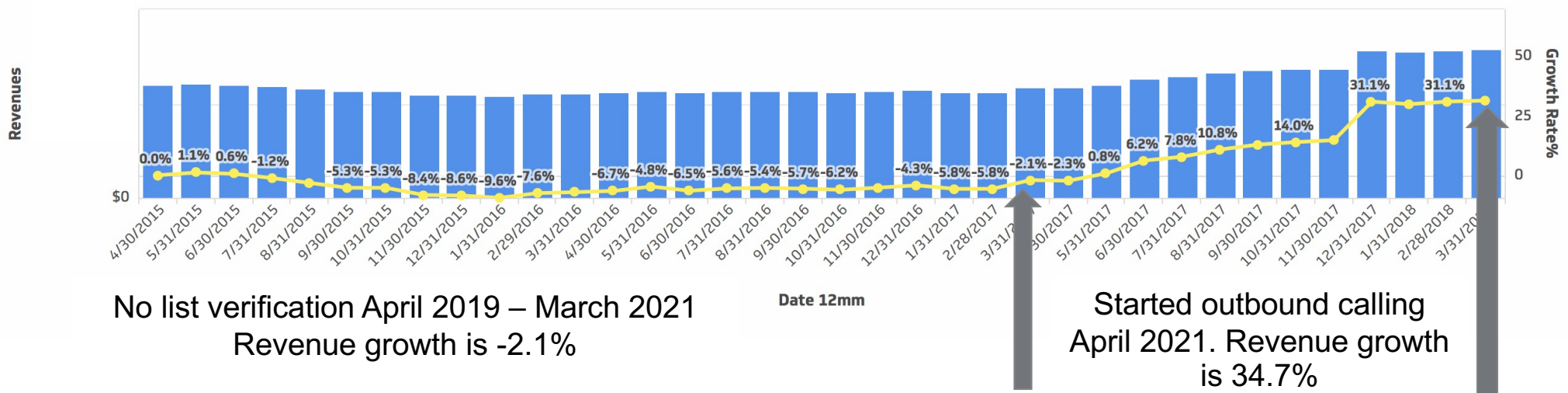
Verified Contacts and Emails
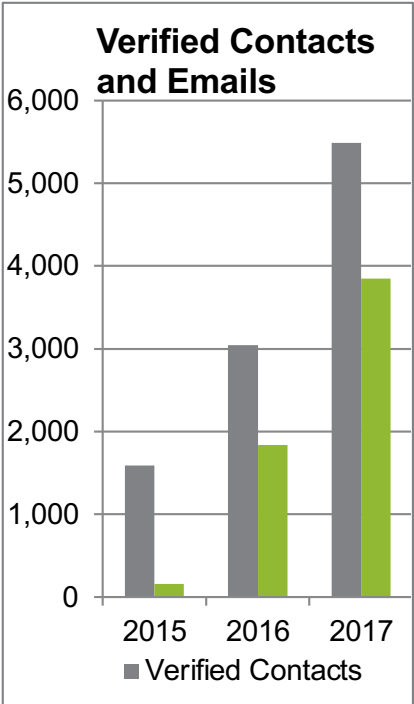
Industry	Total Market
Dog & Cat Food Mfg	193
Cereals Mfg	73
Bread & Bakery Products	1,452
Food Products Mfg	2,240
Candy & Confectionary Mfg	674
Frozen Food Mfg	296
Prepared Fish & Seafood Mfg	400
Physicians & Surgeons Equip	4,167
Surgical Instruments Mfg	93
TOTAL	9,588

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.

No list verification April 2019 – March 2021
Revenue growth is -2.1%

Started outbound calling April 2021. Revenue growth is 34.7%

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

- 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
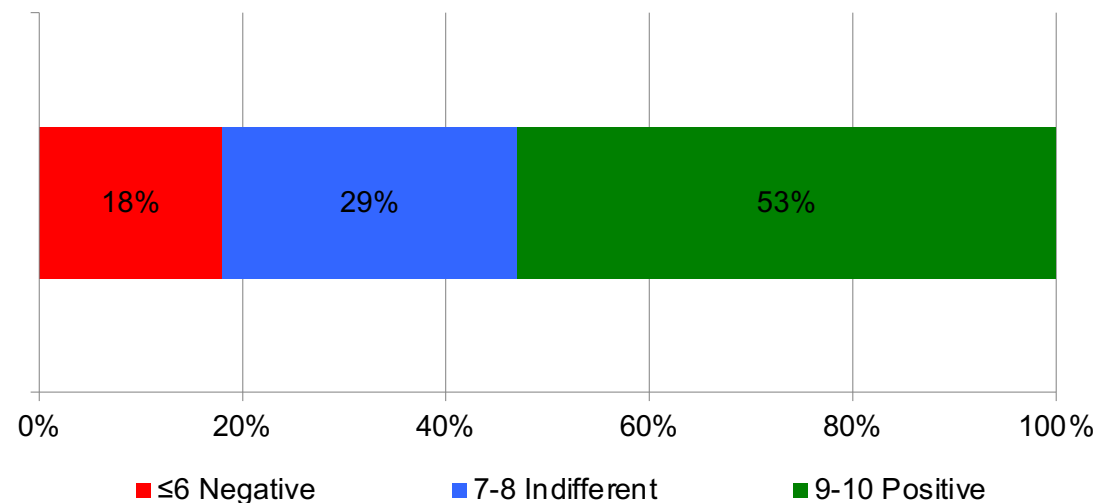
Customer Satisfaction Surveys

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?"
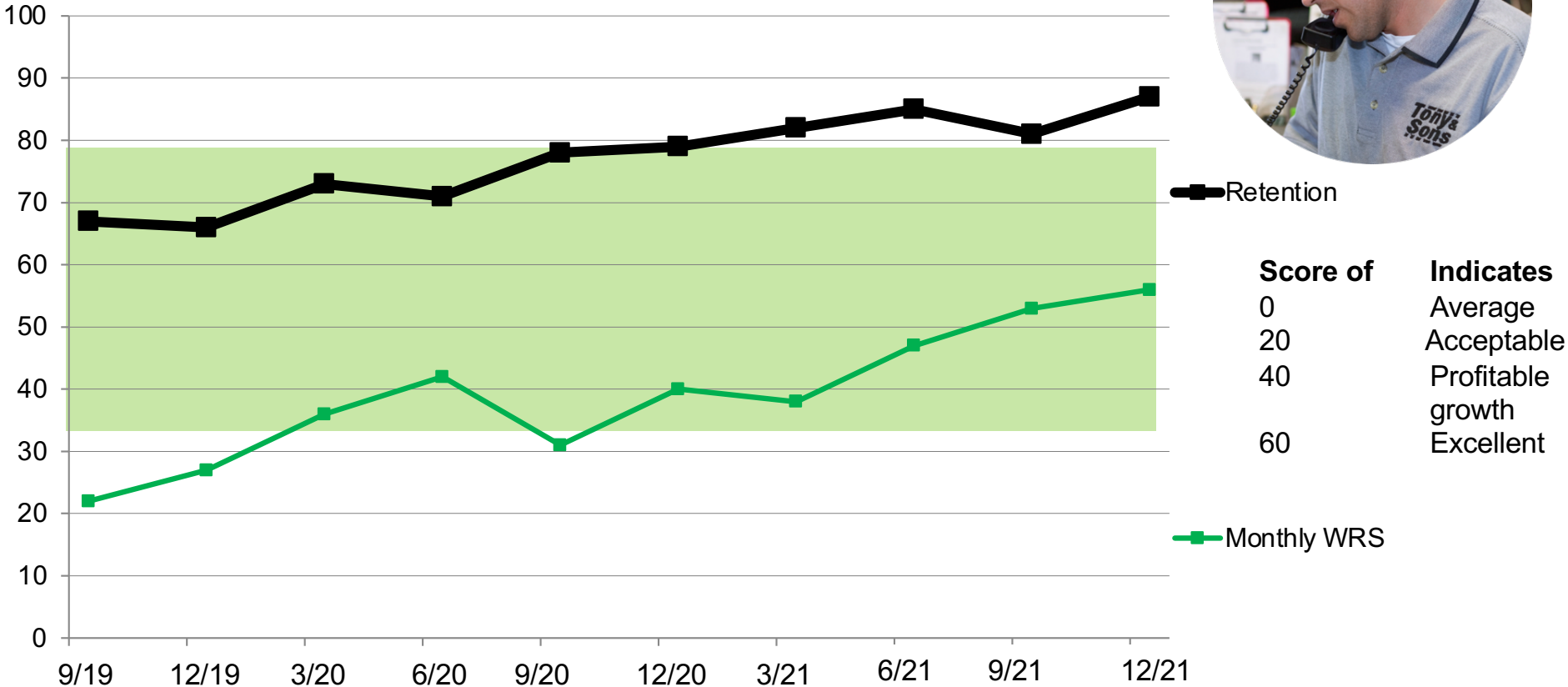
What Will Improve?

- 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®

18%	29%	53%

0%   20%   40%   60%   80%   100%

■ ≤6 Negative   ■ 7-8 Indifferent   ■ 9-10 Positive

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%.

Retention

Monthly WRS

| Score of	Indicates
0	Average
20	Acceptable
40	Profitable growth
60	Excellent

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%
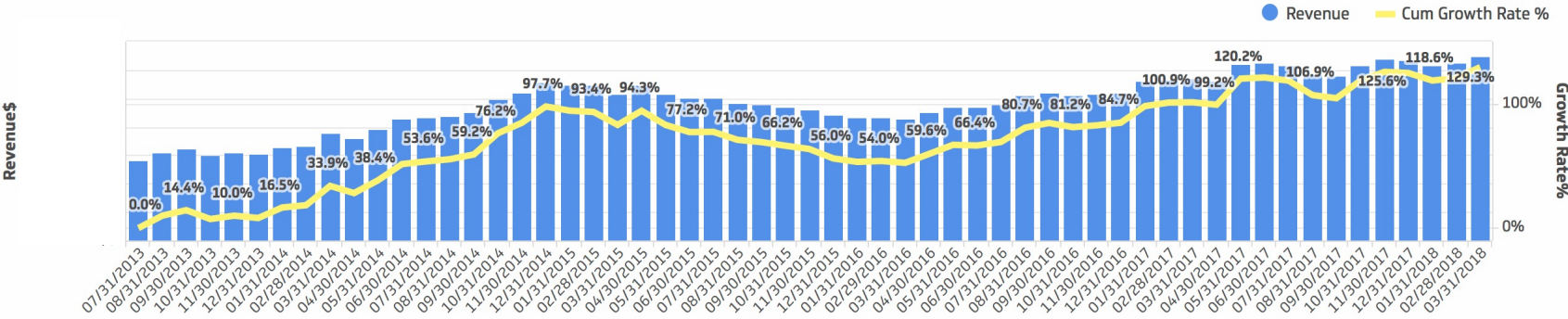
Growth in revenue per active account, by rolling 12 months, is 39%, and **average revenue per account** is $41,650
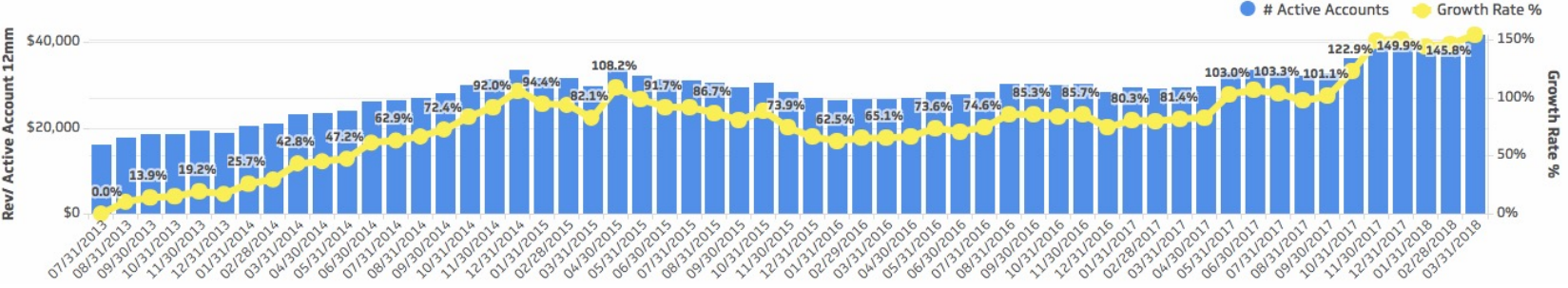
Key Metrics – Last Purchase Timeframe

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	
			$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	Sales Rep
			$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

Report: Customer name
12 month purchase
amount
Last purchase date
Order frequency
Sales Rep

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	
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Sources of Leads

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

Website Visitors

	LEADS			
1	Henry Sommer Last on Wed, Feb 4th at 12:19 pm 717 3824793 hsommer@zoominternet.net Web: zoominternet.net		NEW	7 Pages
2	Randyt Tomlinson Last on Wed, Feb 4th at 1:16 pm 6088425418 randyt@demco.com Web: demco.com		NEW	3 Pages
3	Randyt Tomlinson Last on Wed, Feb 4th at 1:16 pm 6088425418 randyt@demco.com Web: demco.com		NEW	3 Pages
4	Mac Cook 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
Increase qualified leads for your sales team	**The SharpSpring web tagging program** notifies you when someone visits your website, so you can call them quickly.	**Sales reps quickly become inundated with qualified leads.**
	Email open reports show who is interested in your emails.	
	Calling produces hot leads looking to purchase.	
	Key metrics reports provide details by sales rep for customers that haven't purchased within the past 8 weeks.	
	Customer satisfaction surveys identify unhappy customers. Calling them and fixing their problem prevents them from leaving.	
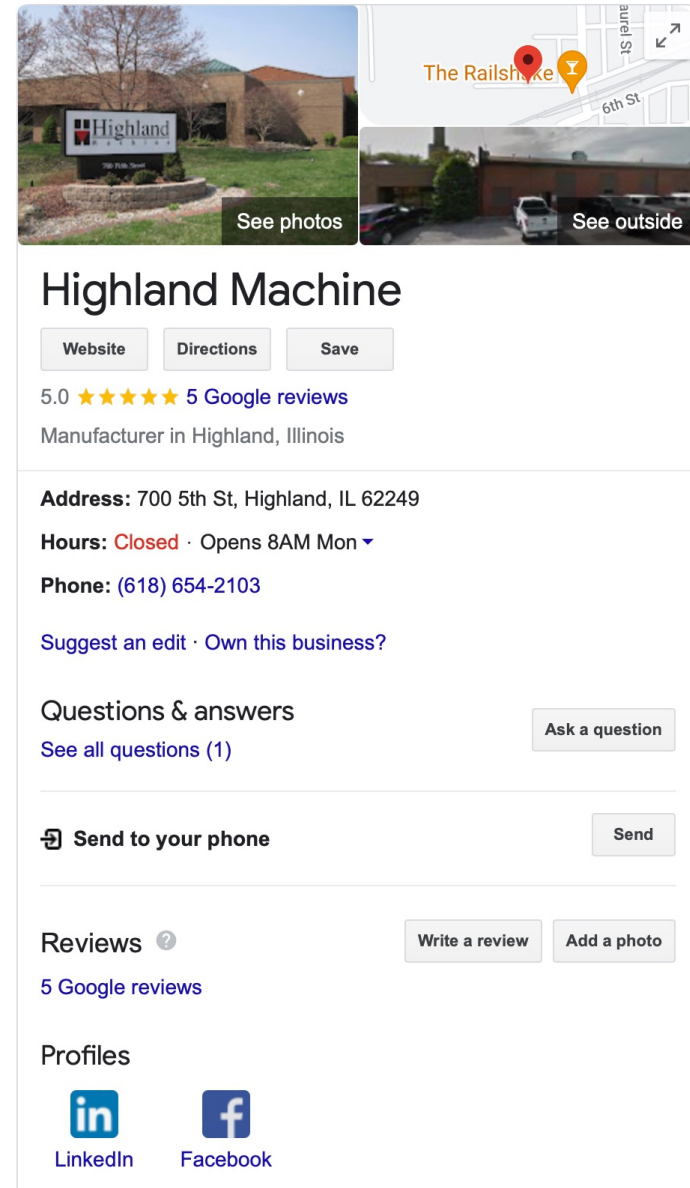
The KPIs are monitored by reviewing the company's invoices each month.

Check The 5 Basics

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?

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

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