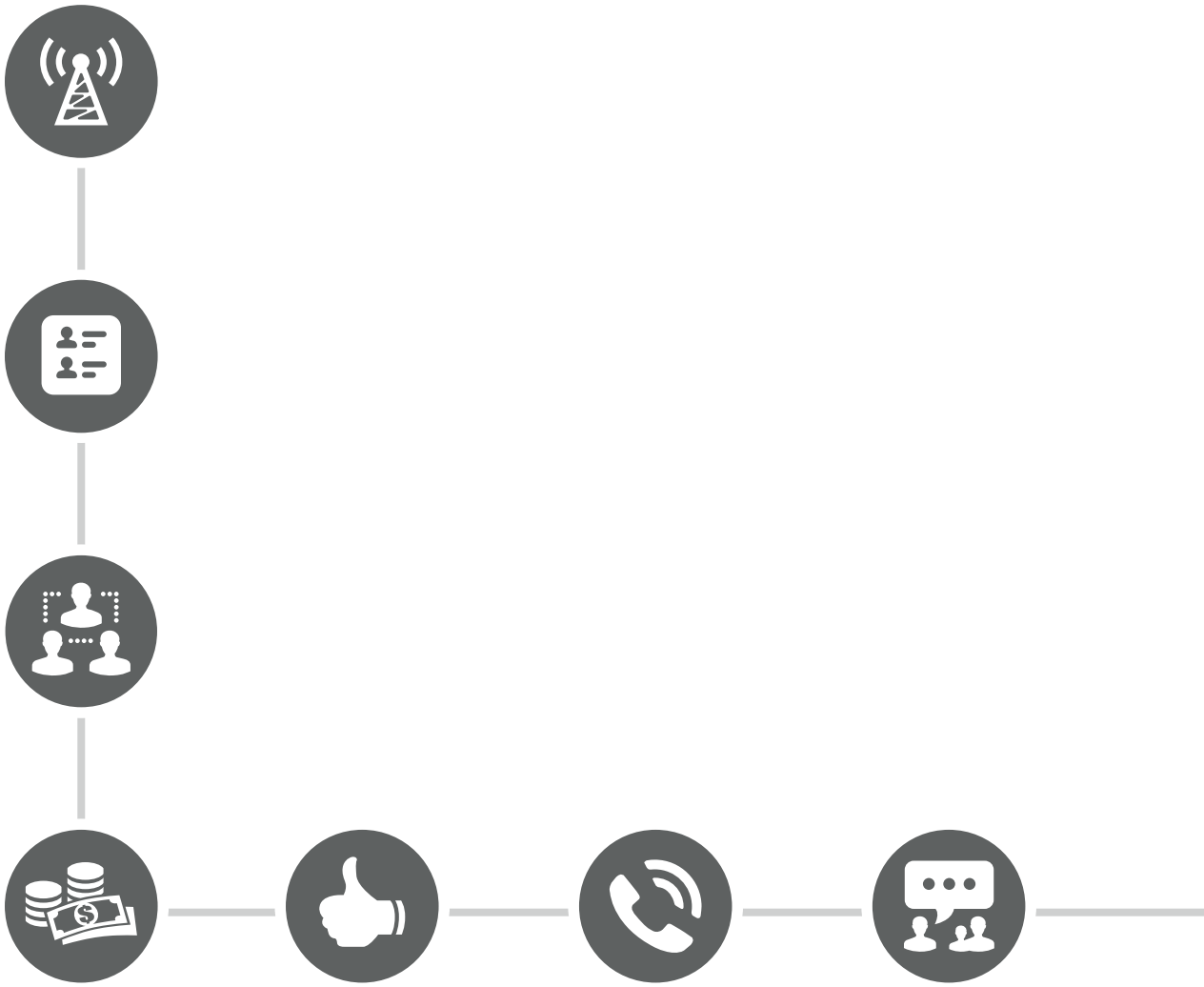
Marketing Automation Framework Workbook



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Marketing Automation Framework Workbook

Building a Marketing Strategy can get really complex in "the Social age". The trick is not only to use to right tools, but to use those tools in the right way. Marketing automation is no different. This workbook is created to ask some of the questions that you should answer in order to have an effective Marketing Automation Plan.

Take your time and work through each question as it relates to your unique business. Use it in conjunction with the 'Building Your Marketing Automation Plan' article as it elaborates on each of the steps and will provide some clarity.

? General Questions

What activities are you doing in each of the 7 stages?

Awareness: _____

Capture leads: _____

Educate and Build Trust: _____

Convert Sales: _____

Deliver and WOW: _____

Upsell/Repeat Sales: _____

Generate Referrals: _____

Describe your ideal client:

_____

_____

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Who is NOT your ideal client?

What is your Unique Selling Proposition?

Write down your message to your ideal client i.e. why they should do business with you?

List out all the venues where you can find your ideal client.

Awareness

How are you attracting traffic to your business now?

What methods are working?

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What are you trading for prospect information? Create some giveaways that connect to your prospect's pain, for example:

- What are the common pitfalls your clients fall into? (E.g. 3 common (marketing) mistakes that you don't know you are making, etc.)
- What are the benefits your clients seek? (E.g. 3 tricks to Marketing Automation, etc.)
- What frustrates your clients when they deal with your competition? (E.g. 10 questions to ask your Web Strategist, 3 things to consider while picking your accounting firm, etc.)
- What are your clients trying to learn? (E.g. 10 tips for better SEO, 7 steps to Marketing Automation, etc.)

Measure: How many visitors or leads interact with you business per month? How much do you spend on spreading awareness? Social media likes and shares, blog likes and shares, etc.

Capture Leads

How many leads do you capture each month? Website, walk-ins, telephone, networking, tradeshows, etc.

How many leads should you be capturing each month?

What information should you be capturing from prospects who are not ready to buy? E.g. Job title, Industry, Company name, etc.

Measure: Number of visitors you capture each month. What % of those is in the ideal client category? What is the average spend per captured lead? What is the average spend per captured ideal lead.

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Educate & Build Trust

How do you follow up with your prospects? Fill the following stats:

Number of follow-ups: _____

Media(s): _____

Timing: _____

What is your follow-up goal?

1st-follow up _____

2nd follow up _____

5th follow up _____

8th follow up _____

What percentage of this follow-up is automated? _____

How do you separate your hot leads from your cold leads?

_____

_____

Do you adjust your messaging according to your interactions with these leads?

_____

_____

Measure: Email open rate, click through rate, opt outs, prospect phone calls, Number of hot/cold leads each month, number of real opportunities created each month and the associated $ value.

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Convert Sales

How do know when the prospects are becoming interested and moving closer to buying?

Do you change your messaging to the hot leads?

What are the key objections you need to overcome?

Can you give them a promotion or an offer to convert sales?

Measure: Number of new clients every month and the associated $ value.

Deliver & Wow

What do the new clients need?

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How do you WOW your clients?

_____

_____

What are the most common reasons for unhappy clients?

_____

_____

How do you respond to client service issues?

_____

_____

What can you do to WOW your clients? Think of some ideas that are cost-effective, yet something your clients may appreciate e.g. Birthday card/cake, gift card, etc.

_____

_____

Measure: Number of client service issues per month, Number of contract renewals, Number of lost clients every month.

Upsell / Repeat Sales

What is the lifetime client value of your ideal client?

_____

_____

What % of your clients would buy more than once? _____

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How can you encourage your existing clients to buy more from you?

Measure: Client lifetime value vs the actual value of the clients.

Generate Referrals

What is the lifetime referral value of your ideal client?

What % of your business comes from referrals?

What do you do to systematically ask for referrals?

Why do they send you referrals?

How do you rewards clients who refer?

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How can you empower your clients to refer business?

Measure: Client referral value vs Actual referral value, Spend on intentional referral program.

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