AUTOMATED MARKETING AND SALES

FOLLOW-UP MADE EASY

ONTRAPORT

ABOUT THIS EBOOK

Automated Marketing And Sales Follow-Up Made Easy

Following up with prospects and clients is important for your business's growth. A solid follow-up strategy can lead to more revenue, better relationships with customers, and a more efficient sales team, but many entrepreneurs still aren't doing it. We understand that following up can be time-consuming, repetitive and easy to forget. That's why we put together this ebook with self-audit, step-by-step instructions on getting started with automated follow-up and tips on how to continue building those valuable customer relationships over time.

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CHAPTER 1

THE BENEFITS OF AUTOMATED FOLLOW-UP

Automated follow-up is one of the best ways to build closer relationships with your prospects and customers as they make their way through your customer journey. Though it may seem counterintuitive, automated follow-up actually allows you to provide more personalized attention: It allows you to segment and follow up based on the lead's specific interests while also giving you more time to interact with leads when it matters.

Before we dig into the details, check out the key benefits of automated follow-up:

BUILD CLOSER RELATIONSHIPS

Anyone who says automation removes the human element in your business is doing it wrong. If you automate the repetitive follow-up processes in your business, nobody will slip through the cracks, receive an irrelevant or untimely message, or feel ignored by your business.

PROVIDE A CONSISTENT AND PLEASANT EXPERIENCE

Automation doesn't sleep, forget or take breaks. If someone opts in to an ebook in the middle of the night, your delivery sequence isn't in the middle of its REM cycle — it's making sure there's a copy of your ebook delivered to that new lead's inbox within minutes.

Having a system that works around the clock means your customers are getting the consistent and pleasant experience they so desire. The messages you wrote and designed are still from you, but they're being organized and delivered without having to press send yourself.

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GIVE THEM WHAT THEY WANT

The ability to automatically segment and target groups based on actions they take — such as opting in for an ebook, visiting one of your landing pages, or clicking on one of your ads — adds to the positive experience you're providing for prospects and customers. If your lead opts in to a podcast on cooking tutorials, for example, you can automatically segment and target him or her with more valuable cooking tips.

TURN MORE LEADS INTO CUSTOMERS

Without automation, it's easy to get behind in your follow-up and let good leads go cold. Those cold leads easily slip through the cracks and eventually become lost opportunities.

Nurturing leads with consistent follow-up over time will not only keep your brand top-of-mind, but also build trust and, as a result, convert more leads.

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INCREASE REVENUE

Converting more leads means making more money. Once a lead becomes a customer, you'll have an even higher chance of increasing revenue because a customer who pays for one of your products is likely to buy again.

SCALE YOUR MARKETING AND SALES TEAMS

As you systemize and automate your marketing and sales follow-up processes, you open more routing opportunities to scale. When there's only one set way to complete each task, it's easier to train new team members to effectively and efficiently do their jobs. When the automated systems are handling the follow-up work for you, you no longer have a limited amount of time and manpower to handle it, all of which allows you to scale.

FOCUS ON WHAT'S IMPORTANT

Automated follow-up means letting the robots do the repetitive work for you, determine your top-scoring leads, and tell you when to call those leads so you can focus on what's important — making sales. Instead of wasting time with leads who aren't ready, the automated system queues up leads for your sales team based on their level of readiness to buy.

DISTRIBUTE AND OPTIMIZE THE WORKLOAD

With sales force automation features like lead scoring and routing, you can manage the number and type of calls each sales member takes. If the more experienced reps are able to handle more calls, you can set the percentage of calls they take to be higher than some of the newer team members. Likewise, if certain sales reps are better at explaining certain aspects of your business, you can route leads interested in those aspects to those sales reps.

CONSTANTLY IMPROVE THROUGH DATA ANALYSIS

An all-in-one follow-up platform gives you the data you need to determine what works and what doesn't. With this information handy, you will be able to constantly improve your follow-up and easily test new things by split testing.

CHAPTER 2

AUDIT YOURSELF

Before diving into changing your follow-up strategy, it's important to have a clear understanding of the follow-up type that best suits your business.

UNDERSTAND YOUR COMPANY'S FOLLOW-UP NEEDS

Different business types naturally have different ways of interacting with their prospects and customers, which means there is no one-size-fits-all formula for superior follow-up.

For example, it's unlikely that you've received an email after purchasing new clothes saying, "Thanks for your purchase! For one-on-one assistance getting you set up with your new clothing, let's get you scheduled for an onboarding call." It simply wouldn't fit. That same email for a software or service company, however, is welcomed and even expected by new customers.

Think about your customers' journey, at what points you interact with them, and how. Some companies incorporate a sales team that follows up via phone with customers, while for others this doesn't make sense, and everything is done through automated follow-up emails and texts.

CHECKLIST: IS YOUR COMPANY USING FOLLOW-UP BEST PRACTICES?

Use this checklist to self-assess your current follow-up:

- Your marketing and sales follow-up messages are templated for quick response times.
- You have established brand guidelines for communicating with prospects and clients.

- Your follow-up funnel is mapped from beginning (when contact is added to your database) to end (after contact makes a purchase).

- You segment your prospects and clients into groups so you're able to target them with information you know they're interested in.

- You've created and implemented automated sequences for the follow-up funnels.

- You have a system for re-engaging cold leads via email, SMS, postcard or phone call.

- You collect and regularly interpret data on your follow-up.

- You use your data interpretations to constantly improve your follow-up.

- You have tested and determined which follow-up mediums are most effective with your prospects/clients (email, SMS, postcard, phone call, etc.).

- If your company uses sales force automation for follow-up, you have a lead scoring system in place.

- If you have a sales team, reps consistently reply to leads' questions/comments.
  - Within a few days
  - Within hours

Whether or not you're following best practices, if leads aren't interested in your content, they won't respond well to your follow-up. Avoid mistargeting your leads by completing the following exercise.

CREATE A COMPELLING OFFER

Brainstorm ideas with your team to find something your prospects can't turn down. Before starting, try to clear your mind of what competitors are doing — the idea is to stand out from your competitors.

Imagine, again, that you are your prospects. Given your prospects' desires, goals and frustrations, think of what you can give them for free that would be so compelling that they would consider it to be clearly in their best interest to take you up on your offer.

Here are a few examples:

- A free report, ebook or workbook
- A free teleconference or educational webinar
- A free book or printed newsletter subscription
- A free educational audio seminar
- Tickets to an event
- Free trials
- Free sample product or service
- Free interviews with people they know, like and/or respect

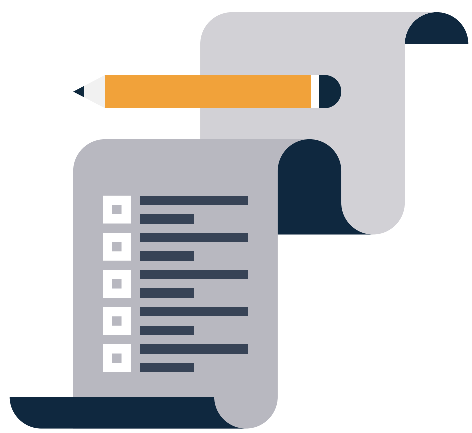
Pick three or four ideas from the brainstorm that make sense for your business. Then brainstorm more specific ideas for each. Use your list of core hopes, desires and fears that you made to help come up with the specifics.

GET IT DONE

Once you complete the to-do list below, you'll be ready to start your follow-up:

1. Build the top ideas from your free compelling offer brainstorm (this can be delegated or outsourced).

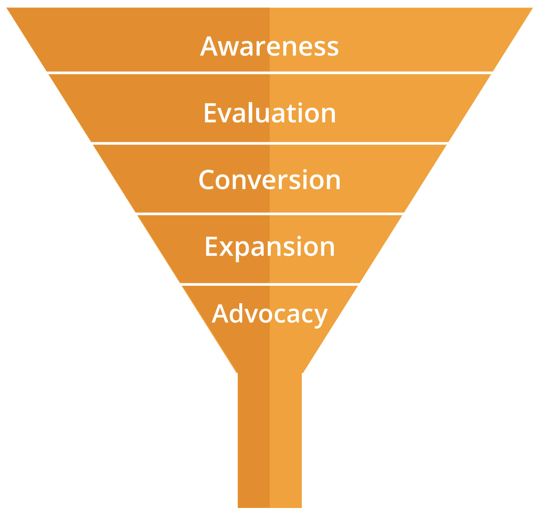
2. Test it. Send a few samples to clients! Depending on the results, you'll be able to decide whether this will be something you use on a larger scale.



CHAPTER 3

INITIAL MARKETING FOLLOW-UP

A good follow-up strategy takes the full customer lifecycle into consideration. In the five-part funnel, customers move from the awareness phase at the top of the funnel down to the advocacy phase — and each requires follow-up in different forms.



A good follow-up strategy takes the full customer lifecycle into consideration.

PREPARE FOR FOLLOW-UP

As prospects become familiar with your brand in the awareness stage, build a relationship with them through marketing follow-up.

Use lead magnets, also known as free compelling offers, to acquire prospects' names and email addresses. If you determined your business would benefit from using sales force automation follow-up in your self-audit, collect phone numbers too.

The moment prospects' contact information is added to your database, your responsibility to nurture those new relationships with follow-up begins. They've shown interest in your business, so the ball is now in your court to make the next move.

SEGMENT YOUR LIST

The success of your marketing follow-up depends entirely on how prospects react to your messages. A surefire way to increase engagement is by segmenting your list based on prospects' interests. When you target them with information they want to receive, you have a higher chance of moving them to the next step down the funnel.

The success of your marketing follow-up depends entirely on how prospects react to your messages.

INITIAL OPT-IN FOLLOW-UP CHANNELS

Part of targeting prospects with what they want to receive is making sure you also send the information in the way they want to receive it. Use these simple strategies to create initial follow-up processes that work for your business every time, automatically.

1. **EMAIL** Email follow-up can skyrocket new sales and help retain existing customers. It's an effective yet simple tool for entrepreneurs and small businesses. Say new leads opt in on one of your landing pages to request an initial discovery call for your consultation business or a piece of gated content. After you collect their name and email address, send them a follow-up email like this:

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It's time to automate your marketing!

Here's your link to download The Marketing Automation Toolkit and get started today.

DOWNLOAD NOW

Whether you're a veteran or a relative newcomer to marketing automation, our goal is to create and share content that will help you get your marketing processes automated to save you time.

Look for some bonus content over the next few days, all written with entrepreneurs like you in mind. To make sure you don't miss anything, please take these steps:

STEP 1:
Whitelist our email address (here's how).

STEP 2:
Connect with us on Facebook, Twitter, LinkedIn and Instagram.

STEP 3:
Check out our blog for more helpful marketing automation content.

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FOLLOW US

Just one friendly correspondence is capable of demonstrating your appreciation and dedication to doing business with your new leads and contacts — your springboard to converting incoming sales leads and fostering brand advocacy.

"

> To be able to create an outstanding customer experience that is automated, that takes care of our folks no matter where they are around the world... really allows us to do what we do best, which is to create outstanding customer experiences.

-Marie Forleo

2. **POSTCARDS** In a crowded digital marketplace, a personal touch here and there may be enough to sway your leads to buy and encourage your existing clients to stick around. Sending a postcard by mail might be exactly how you can ensure your business stands out and gets your prospects' attention.

Postcards are a great follow-up tool because:

- They're inexpensive.
- They're eye-catching.
- They're often read.
- Results are easily measurable.
- You can automate and personalize them.
- They are a physical form of communication that adds a personal touch (which can help your business stand out).

They serve a multitude of purposes when marketing to your leads and customers:

- Free birthday offers
- Anniversary reminders
- Holiday promotions
- Contract expiration reminders
- Cross-sell and upsell offers
- Update contact info requests
- Party invitations
- Appointment reminders
- Thank you cards
- Proposal follow-up
- Demo follow-up
- New product announcements
- Recurring service reminder

Don't be intimidated by the perceived difficulty of sending clients and leads postcards — they're easy to implement into your automated follow-up processes, and they work!

3. SMS If you're like most people, you probably have your phone at arm's reach day and night.

With an open rate of over 90%, automated two-way, personalized SMS messaging allows you to easily communicate with your busy prospects and customers.

While it's not a new concept in the marketing world, it's often overlooked in favor of social media or email marketing. However, SMS is a great tool to utilize in your business, especially for following up with customers. Here's why:

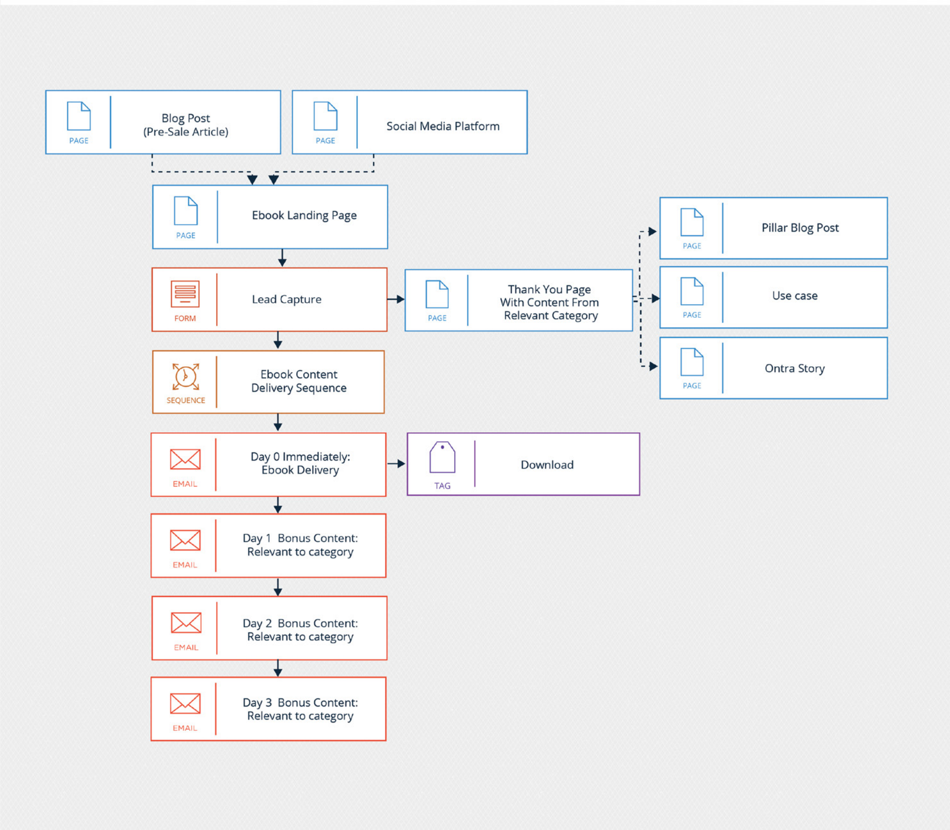
Presented by
ONTRAPORT
Why You Need
SMS
In Your Business
70%
of people
say they would prefer to receive offers on their mobile phones.
82%
of people
want businesses to make it easier to communicate with them.
There are more mobile phones on the planet than there are TVs and 5x as many as PCs
43% of customers are more likely to make a purchase when mobile offers are part of an SMS campaign
90% of SMS users felt they gain value from it
The average cell phone user looks at his/her phone
150x per day
2.12 Trillion
text messages are sent every year
SMS MARKETING!
IT'S AFFORDABLE
Cheap but profitable: a huge ROI.
On average, SMS marketers have seen an increase of 200% ROI over any other form of messaging communication.
12
IT'S CONVENIENT
It's the easiest way to contact people.
76% of people report that they're more likely to read a message sooner if it's an SMS message than if it's an email.
IT'S IMMEDIATE
Messages are sent and received almost instantly.
95% of SMS messages are read within three minutes of receipt.
Read at 3:15 PM
IT'S ENGAGING
We love getting text messages.
98% of SMS messages are read, compared to 22% of emails.
SMS engagement rate is 6-8x higher than email marketing
10X
BUY
SMS coupons are 10x more likely to be redeemed than traditional coupons
https://www
5X
SMS performs 4-5x better than online ads for key metrics such as brand favorability, awareness and purchase intent
80%
And yet... 80% of consumers say they have not been marketed to via SMS by their favorite brands
START USING SMS IN YOUR BUSINESS TODAY:
✦ Appointment reminders
✦ Coupons
✦ Promotions
✦ Contests
✦ Customer Service
✦ Updates
✦ Special Offers
✦ And more...

ORGANIZE AND AUTOMATE

Marketing follow-up should never be random. Though it may look to your prospects like you're simply sending an email here and there, you should always have a plan and strategy behind your follow-up.

In fact, before sending anything to prospects, you should know exactly what role it plays in moving them down the five-part funnel. We recommend mapping out your strategy in a tool like LucidChart before building it in your automation platform.

EBOOK-FUNNEL



Create an outline

When mapping your initial follow-up sequence, remember that it's important to keep your brand top-of-mind daily for the first three days, then move to weekly communications:

1. **DAY 0** Set up a delivery email or text to be triggered immediately after opt-in. This should include their download link or attachment and a thank you message.

2. **DAYS 1-3** Starting the next day, send one message daily containing bonus content they're interested in. This can be a blog article, workbook, template, podcast or any other useful content relevant to that particular segment.

3. **WEEKLY** After the first three days, move on to weekly follow-ups. These messages should continue providing content but also throw in a tripwire offer every several weeks.

   Tripwires are gated content just like your lead magnet, but they have a price tag. They can be anything from a toolkit created to catch leads' attention, to an inexpensive entry-level product that relates to your bigger product. Low-cost is key with tripwires, as they're meant to test the water with prospects. If prospects are willing to take out their wallets and pay for your tripwire, they're more likely to buy your end-goal product.

   Those who purchase your tripwire can be considered hot leads, and are ready to either be contacted by a sales rep or sent an upsell email (depending on what kind of follow-up plan your business is on).

   If they don't go for the tripwire, continue sending bonus content for several weeks before trying again.

Fill in your map with copy

Creating a sequence map is essentially laying out a giant outline with every message you plan to send and when you plan to send it. Starting at the top, fill in every email, text and postcard with the content you wish to automate.

Make your follow-up seamless

As you begin preparing your content, make sure copy, design and overall build are all consistent across the board. To do this, create a set of brand standards for your team to follow. Brand standards will specify what language to use and avoid, your brand's voice and tone, your font type, size and color, and the overall look of your messages.

You may consider building a reusable template for your emails and your weekly newsletter outreach. Within this template, you can set a word count limit, recommended image size and sections with designated topics to fill in.

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Weekly **Digest**

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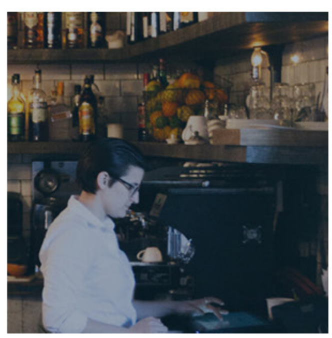

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FOLLOW US

Build it and let it run

Automating and forgetting is one of the biggest mistakes businesses can make.

With your mapped sequence and copy in place, you now have everything needed to build them in your automation platform. Once your sequence is built, your job isn't done. Automating and forgetting is one of the biggest mistakes businesses can make.

As your follow-up sequence runs, you will quickly gather data that tells you what's working and what isn't. It's your job to pay close attention to these numbers because they allow you to fine-tune your sequences, improve over time, and track which leads are most interested in your brand.

CHAPTER 4

LEAD SCORING TO QUALIFY PROSPECTS

Having a tool that helps your team to track and prioritize leads allows them to focus their efforts where they count: Instead of guessing which client or lead to call, they can go through a list of qualified prospects assigned to them automatically.

The ability to identify the most meaningful connections with clients and leads means not only the opportunity to build stronger relationships, but also the ability to generate more revenue for your business.

COMBINE TASK AUTOMATION WITH LEAD SCORING

Lead scoring provides your sales team with insight into which of your leads are most likely to buy.

To start scoring your leads, you'll need to identify the signals that leads send when they're ready to make a decision to buy. Identify these signals by looking at the data you have about your customers and noting what they have in common. Do many of them have a similar job title? Do most of them come in from a certain lead source or referrer? On top of that data, you should also look at trigger behaviors. Maybe visiting your sales page, downloading a lead magnet or performing some other kind of behavior tells you that a lead is ripe for follow-up.

Once you know these details about your customers, you have the info you need to find more people like them. With a lead scoring system, you can assign points to each of the trigger behaviors performed by your leads or based on data about themselves that they provide to you via your forms.

Once their score has broken the threshold that you set to qualify them as a great lead, you can have a task be automatically triggered for you or your team to follow up with them. A task consists of a message, delivered to any email address you choose, that includes relevant information about that customer pulled from your database, and instructions for what to do next.

For example, say that you assigned leads five points for visiting your sales page, 10 points for downloading a lead magnet, and five points for clicking on one of your offer emails. If leads reach 20 points, it's time to give them a call. So, you could create a rule with the following logic: "If a contact has a lead score value of 20 points or higher, then assign a task to [team member email address] to call him/her and offer the product."

By combining these two powerful tools, lead scoring and automated tasks, you can find your hottest leads and follow up with them when they're most ready to buy – an easy way to increase your sales numbers every month.

MAINTAINING YOUR LEAD SCORING

The opportunity to focus more on making sales and less on who to target is highly beneficial for your team but, like automated marketing follow-up, it's important to remain aware of and make continuous improvements to your lead scoring and routing systems. For example, your sales team may notice that people who visit your sales page actually aren't as interested in purchasing as you previously thought. In this case, lowering the points awarded for visiting your sales page from five to one point would make sense.

Additionally, for scores to remain accurate over time, set up a system for score degradation. The longer a lead goes without converting, the more points drop from their score.

WHY AUTOMATING THE LEAD SCORING PROCESS IS IMPORTANT

You and your team have limited hours in the day for following up with leads and, odds are, you can't always do it all. You might even struggle with knowing who needs follow-up when. For example, say you want to follow up a month later with everyone you talk to who's not yet ready to buy. To do this, you've got to keep track of every conversation you have, maybe on a spreadsheet or a calendar, then remember to book a follow-up call a month later, or look back to see who you talked to 30 days ago to make a list of calls for the day. This is inefficient at best, sloppy at worst.

Task automation can solve this problem neatly. If you assign every new lead who enters your system to a long-term follow-up sequence that includes task reminders for your team to follow up at the right time, it eliminates the guesswork of figuring out which leads you should call on any given day. It also makes sure that no leads are ever forgotten, maximizing your chances of making the sale and boosting your revenue.

Use automation tools like ONTRAPORT to get started with lead scoring. Learn more by watching this video.

LEAD SCORING APPLICATIONS BEYOND SALES FORCE AUTOMATION

Even if your self-audit determined that your business doesn't need sales follow-up, lead scoring should still be on your radar. The ability to instantly see a list of your top leads allows you to collect data that will help you more accurately target your leads with ads.

Behavioral tracking

Find out the winning combinations for top leads by tracking their behavior on your marketing materials. This includes tracking their clicks on your website, ads and blog articles so that you know which areas of your marketing are drawing in the leads. Once you've gathered this information, you'll be able to focus on those specific areas of your marketing to attract even more valuable leads.

CHAPTER 5

ORGANIZE SALES FOLLOW-UP WITH LEAD ROUTING

To make sure your team is receiving a manageable amount of leads, use lead routing to systematically assign contacts to your sales reps. No matter where you're generating your contacts from — marketing funnels, web forms or ads — you can easily distribute your leads to your sales team for follow-up. Lead routing allows you to control whether you want your leads to be distributed in a round robin style or in a weighted random distribution where a higher percentage of leads is given to some and lower to others.

TYPES OF LEAD ROUTING

Though there are many load-balancing algorithms that could potentially be used for lead routing, we'll focus on the two available in ONTRAPORT: round robin and weighted random.

Round Robin

A Round Robin lead router evenly distributes leads one-by-one to each of the sales reps that are in the router you create. Everyone will end up with the same number of leads over time.

If there are four sales reps on your team, the lead router will assign each of them a number. The first task will go to sales rep one, the second to sales rep two, and so on.

Weighted Random

Weighted Random allows you to set percentages of leads per sales rep. Use this lead router if you want to assign a greater percentage of leads to certain reps and a lower percentage to others. This is helpful for sales teams with reps of all different experience levels because it allows you to assign a higher percentage to the more experienced team members. Additionally, weighted random lets you direct leads with specific interests to reps who know how more about those topics.

Each new lead that comes in is randomly assigned to a sales rep in the lead router, but with the probability set according to the percentages you set up. In the long term, everyone will end up with the share of leads they were assigned by percentages in the settings.

Once the lead is routed and the sales rep reaches out to them, the job's not done. After talking with the lead, the rep can use your automated system to make a note that fires a follow-up sequence to continue nurturing the new relationship. This follow-up can be anything from a series of emails, postcards and SMS messages, to a task reminder to make a phone call.

CHAPTER 6

CONTINUE TO NURTURE RELATIONSHIPS

Whether your prospects purchase or not, you should still continue to nurture your relationship with them over time. Think of lead nurturing as a weekly reminder to customers and prospects that your brand exists. For best results with your long-term follow-up, create different messaging for those who purchased and those who didn't.

IF THEY PURCHASED

Congratulations! You have a new customer. Did you know that creating and maintaining valuable relationships with your customers is the most effective way to increase revenue? In fact, according to Help Scout, "The probability of selling to an existing customer is 60-70%, while the probability of selling to a new prospect is just 5-20%."

If you don't make it a habit to check in on your customers and continually provide them with more value, you'll also be missing out on revenue. By prioritizing the tasks and conversations that help your customers get the most out of your product, you can increase your sales by turning temporary customers into long-term, loyal customers.

You can do this with automated task follow-up by placing new customers onto a sequence designed to provide them with the most optimal post-purchase experience. This should include tasks for you to check in with them and see how things are going at fixed points, whether your product is sold on a recurring, subscription basis or a one-time purchase. By getting in touch after the sale, you can make sure they're getting use out of your product or services to increase their adoption. This is guaranteed to improve your retention by providing customers with more value.

Your long-term follow-up can and should come in many forms. Try to mix it up between sharing upsell and cross-sell offers, coupon codes for return customers, bonus content and "you're hearing it first" emails. If you're feeling really creative, also sprinkle in different mediums like SMS and postcards for follow-up.

Here are a few examples of ways to keep your brand top-of-mind for existing customers:

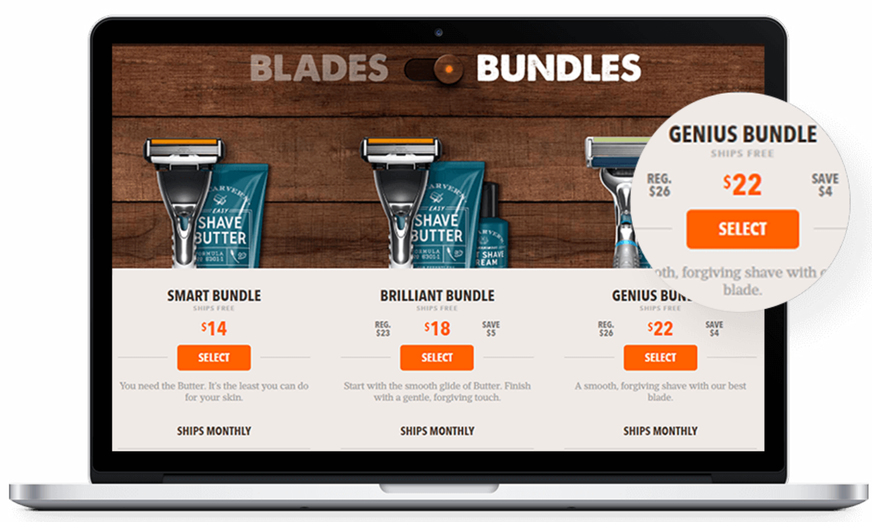
Upsell and cross-sell offers

Almost every online shopper has experienced Amazon's mastery of the upsell. With their endless product suggestions, "Frequently Bought Together" prompts, and bundled packages, it's no surprise that upselling accounts for over 35% of their total revenue. Upselling doesn't have to be reserved for huge companies with hundreds of thousands of products to push at their customers. In fact, you get upsold (or cross-sold) every time you say yes to the smiling waiter who offers you dessert at the end of your meal or to the phone company who convinces you to add additional data to your monthly plan. Upselling is about understanding and anticipating exactly what your customers will want and offering it to them at just the right moment.

All it takes to outfit your ecommerce site with effective, revenue-generating upsell offers is a thorough understanding of your customers' needs combined with the ability to tap into those desires using automation software.

Upselling to customers who are inclined to or have recently bought from you has great potential for ROI — in particular ROI per customer. On top of that, a properly executed upsell can usher your customers into the next phase of the customer lifecycle: generating evangelistic supporters of your company and valuable testimonials (or social proof) for your product.

[Dollar Shave Club]() does an excellent job of upselling their monthly razor subscriptions, as they offer a $1, $6 and $9 option. The baseline, $1 product looks rather bare in comparison to the more luxurious blades offered, and the side-by-side product descriptions support this. The prices of the blades also contribute to the allure of the up-sell, as they are all within a decent range of each other. A price in-crease from $1 to $6 is by no means a big leap. Similarly, a jump from $6 to $9 would hardly deter even the most frugal of prospects.



Dollar Shave Club has also mastered the cross-sell: an attempt to promote and add a supplemental but related product to the original purchase. In contrast to Dollar Shave Club's "Blades" (upsell) page, their "Bundle" (cross-sell) page displays accessory products that complement the original razor. The products are intuitively related to the customer's initial desire to purchase a razor, because they showcase products that are frequently bought together. The ingenuity doesn't stop there: The page also displays how much money the customer potentially saves by purchasing the products bundled. Each of these factors play a role in creating an easy and time-saving buying decision for the customer.

Offer a discount

Every once in awhile, work a discount offer into your follow-up. Here are a few examples of special occasions to offer coupon codes:

- Birthday
- Holiday
- Milestones - One year since joining, spending a certain amount for rewards, etc.
- End of season - Particularly for brands that update inventory quarterly

Better yet, use SMS to deliver your coupon codes. With SMS's open rate of over 90% and its low cost, it's the perfect way to diversify your follow-up and really get your customers' attention.

But, it's important to only use it strategically to build a relationship with your customers. Sending an excess of text messages can come off as spammy and result in unsubscribes.

“You’re hearing it first”

People enjoy feeling like they’re part of an elite group, so tell your customers about a release or a sale before making it public. If your entire customer base seems too broad, consider taking this as an opportunity to target only your top customers.

If they didn’t purchase

Your prospect may not have purchased, but this doesn’t mean they’re a cold lead. Keep them interested with a follow-up sequence designed to highlight the “why” for purchasing your product. Keep it light by providing them with value in every message, without directly asking them to buy your product.

In your follow-up, target your segmented lists of prospects with valuable information they’re interested in. If a group of users opted in for a toolkit about interior design, put them on a sequence sharing useful bonus content on interior design.

At the end of this sequence, encourage them to buy by offering your gated tripwire content. If they buy, they get 20 points added to their lead score which triggers a phone call from one of your sales reps. If they don’t go for it, put them through another round of follow-up and do it again.

CHAPTER 7

WHAT'S NEXT

As your automated follow-up takes off, remember to cycle through all the steps you used to build your strategy and constantly improve upon them.

As often as possible, take the time to self-audit and determine if all follow-up best practices are being followed. Thoroughly cycle through the original steps you took to set up your automated follow-up with a critical eye, particularly paying attention to these points:

- **LEAD MAGNETS ARE UP-TO-DATE** and are still effective for your target market.

- **YOUR EMAIL LIST IS CLEAR OF ANY INACTIVE OR BOUNCED ACCOUNTS** that could affect your delivery rates. If people aren't opening your messages or clicking your links, ISPs will send your messages to spam folders or stop delivering your messages entirely.

- **YOUR FOLLOW-UP MESSAGES ARE GETTING THE HIGHEST POSSIBLE ROI.** Compare all of your messages on their respective platforms side-by-side. If you have one SMS message that's consistently outperforming other SMS messages, find out if there's an obvious reason. Maybe it's being sent at a different time from the others or uses noticeably different wording. Do the same thing for postcards and emails.

- **YOUR MESSAGES ARE ON-BRAND** with new copy and design standards. As time goes on, older follow-up messages will begin to look outdated. Run through every sequence to make sure no out-of-date messages are being delivered to your prospects or customers.

- **LEAD SCORES ARE ACCURATE** for predicting leads that are close to converting. If you're noticing that people who visit your sales page aren't actually as likely to buy as you initially thought, lower the points awarded for that action. The more you tell your automation software about your leads' behaviors, the more accurate it will be.

- **YOUR REPS ARE GETTING LEADS THEY CAN HANDLE.** Sales teams gain and lose reps over time. As reps gain more experience and newer people get hired, the percentages assigned in your lead router will need to be updated accordingly.

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For over a decade, we have made a difference for thousands of businesses, their community, and our own staff, which is why we’ve received countless awards for innovation, revenue growth and company culture.

Our flagship marketing automation product is a subscription software that provides our customers with all the tools they need to start and grow their businesses through the advantage of an all-in-one platform. In addition, we also offer a large collection of free resources, courses and educational products that support entrepreneurs at any stage throughout their journey.

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