

Discover 7 Follow-up Secrets You Can Use In Your Business Now



Why lack of follow-up
kills most businesses..
and what you can
do about it.

The Entrepreneur's Guide To Mastering Follow-up

By Clate Mask, CEO of Infusionsoft

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About The Author **Clate Mask**

Clate Mask joined Infusionsoft as President in 2002. He is regarded as a leading authority on small business and marketing with a career in technology and entrepreneurship that spans more than a decade. Under his leadership, Infusionsoft has grown into a dominant force in the market, doubling in revenue the last three consecutive years, attracting venture capital funding and becoming the leading marketing automation software for entrepreneurs. Prior to joining Infusionsoft, Mask headed up business development at North Sky, a Web services company that was acquired by online content provider About.com in December of 1999 for \$42 million. Before the acquisition, Mask was instrumental in building North Sky, pursuing capital, and facilitating the sale of the company to About.com. After the acquisition, he took on a role as Director of Revenue Management, where he was responsible for generating new sources of revenue and managing the organization's sales efforts for several Internet properties. Mask holds a Bachelor of Arts degree in Economics from Arizona State University. He earned a J.D. from Brigham Young University's J. Rueben Clarke Law School and an MBA from the Marriott School of Business at Brigham Young University.

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"...this guide is all about the ONE thing that is sure to dramatically improve your sales."

Introduction

I want to talk to you candidly, from one entrepreneur to another. You have a great product or service. You have big dreams and aspirations for your business – it doesn't feel like a "small business" to you. You're going to make something of it. You're passionate about what you're doing. You're confident, you're working hard, and you're enjoying some success.

But you sure wish there were more of YOU to go around.

You've probably learned that effective management of your people and resources has everything to do with your bottom line. And nowhere does that ring more true than in the sales and marketing functions of your business. If you could only get more out of your sales and marketing efforts, you know your profits would soar.

If this strikes a chord with you, then this guide will be one of the most important and exciting messages you will ever read. Because this guide is all about the ONE thing that is sure to dramatically improve your sales.

It's all about follow-up. Follow-up, follow-up, follow-up.

Let me start from the beginning...

Many years ago, my software company was providing customized software to small businesses wanting to use the power of automation to grow their companies. We built all sorts of custom software applications. Most of them had a customer management component to them.

Then one day, a guy came to us and asked us to help him more effectively manage his leads and customers. He was trying to follow up with his prospects and customers, but he was making lots of mistakes. He was having a heck of a time keeping straight leads, responders and customers.

He couldn't track things properly and the follow-up was hit or miss.

So he hired us to write a software program that would help him automatically follow up with prospects and customers, track the communications, organize prospects and customers into groups and run the whole "follow-up" function of his business. He was thrilled with what we created for him and he went away very happy.

But then he came back. Turns out, he had a bunch of

mortgage broker clients who realized what his software was doing for his business... and they wanted it for their businesses. So, we "productized" the software program and provided it to a few dozen mortgage brokers, who began to rave about the product.

Things were going so well with our mortgage broker clients that we moved away from the custom software business and began selling our "follow-up machine" exclusively to mortgage brokers. I was doing the selling, talking to prospects, following up with leads, educating people on the benefits of our software, etc....

... and then something amazing happened.

We began to use the follow-up features of the software in our own sales and marketing efforts. Suddenly, prospects I had never talked to were calling me up saying they were ready to buy. I was having conversations with people who had heard from me several months earlier and had been receiving my follow-ups.

Streams of prospects were literally coming out of the woodwork, calling me, emailing me. They were hot and ready to buy.

That's when I knew we were on to something.

And our business has never been the same since. Today, thousands of people use our software every day to follow up, educate their prospects and customers, cultivate lasting relationships and maximize the value of their prospect and customer lists. The software does a lot for small businesses that want to grow fast, but "auto-pilot follow-up" is at the heart of it all.

The point, what I want to share with you, is not just from my personal experience. Although my own experience with powerful follow-up techniques has been life-changing, I have seen these secrets work for thousands of entrepreneurs who have found a better way to sell and market their products and services.

You don't need an army of tele-marketers to do this. You DO need to know the proven secrets to mastering follow-up. And I promise you that when you put them into play, it will change the way you do business. It will super-charge your marketing and sales in ways you never believed possible.

It will put your marketing on auto-pilot, which is the best

"...I have seen these secrets work for thousands of entrepreneurs who have found a better way to sell and market their products and services."

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way to get the most out of your prospect and customer lists without hiring tele-marketers to do your follow-up for you.

Okay, so now that you know where I'm coming from, let me ask you a potentially painful question:

"Are you consistently and effectively following up with ALL of your prospects and customers?"

I have asked this question to literally tens of thousands of entrepreneurs, marketers and successful small business owners. And you know what?

999 times out of a 1000 the answer is a big, fat, painful NO!

My guess is that you're no exception to the rule. No matter how well your business is doing right now, so-so, good, or GREAT, you know you're leaving a ton of money on the table.

Now let me ask you a less painful question:

"What would happen to your business if you consistently and effectively followed up with all of your prospects and customers?"

Now that I think about it, maybe that question is sort of painful.

I mean, just imagine for a second, how much more cold, hard cash you could have stuffed into your personal bank account last year if you had managed to consistently and effectively follow up with your prospects and customers?

So, let's think about the pleasant side of things. Don't you wish you had so many new customers coming in that you could pick and choose who you wanted to work with and turn away the rest?

I mean, wouldn't it be just great to know you'd never again have to stress about whether you'd reach your sales goals for the month? No more pulling your hair out and biting your nails in front of the spreadsheet, trying to make the numbers work; no more lying awake at night staring up into the dark, trying not to give in to that tight knot of tension in your stomach, hoping and wishing for it all to somehow be OK when you wake up.

Imagine not having to worry about making your payroll or paying that pile of invoices on your desk. Wouldn't it be just incredible to know you have plenty of new business and money coming in, day-in, day-out, as regular and

predictable as the tides?

Well, the truth is, you can do this in your business. It's not snake oil, it's not fantasy or fiction and it's not hype. It's about the perfect combination of marketing and technology that will enable you to get more out of your sales and marketing, more out of your prospect and customer lists... without having to hire and manage a bunch of sales reps to do your follow-up for you.

Hey, we all know, deep down inside, that effective follow-up is the key to turning more prospects into paying customers, and to turning good clients into GREAT clients. But I think nearly every entrepreneur is guilty of overlooking just HOW MUCH of a difference it makes to his or her business when effective follow-up is in place.

In the next few pages I will give YOU the Seven Foolproof Secrets to Follow-up Success PLUS a simple, no-brainer 14-step follow-up campaign you can use as a template to dramatically improve the number of paying customers you're getting from your existing leads.

And not only will I give you the template to use for your prospect follow-up that will convert more leads to customers, you can use the Seven Foolproof Secrets to Follow-up Success to convert those customers into repeat clients and raving fans who line up to do business with you month after month, year after year.

But before we jump into the seven secrets of follow-up mastery, let me tell you why I'm so passionate about the subject. See, I'm just a regular guy. But there's one thing about me that I've come to realize is a bit irregular:

I LOVE to build small businesses. More specifically, I love to turn small businesses into big businesses. I love to do that with my own business and I love to see others do the same with their business. Having said that...

... I know how challenging it is to start and run a business. I've done it several times. The early days of our custom software business (the one I told you about before) were so difficult that I nearly lost everything. Talk about walking through the valley of the shadow of death. I've been there. It is excruciatingly painful! I believe the true costs of failed entrepreneurship are enormous – way too high. Families break up, homes are lost, partners become embittered, confidence is destroyed and human creativity is squashed. It is truly tragic. I have

"...I love to turn small businesses into big businesses."

"You CAN effectively build a small business without hiring that army of tele-marketers to sell your wares."

deep, personal, intense, abiding empathy for every entrepreneur out there who is struggling to make things work.

But here's the silver lining: once our company got to the stage where we had a product, a target market and a lot of blood, sweat and tears at play, **the big thing that made the difference was consistent and effective follow-up.**

And so my message to you is that there's a better way to build and run a small business. The failure rate of entrepreneurs doesn't have to be so high. You CAN effectively build a small business without hiring that army of tele-marketers to sell your wares. And THAT is why I want to share this skill with you. That's why I want YOU to become a follow-up master.

I've spoken with thousands of entrepreneurs who have confessed to me that if they could just figure out how to follow up more consistently with prospects and customers, they would have much more profitable and dependable businesses.

Unless you're the rarest of exceptions, you're in the same boat. But I want to help you get out of that boat and get into a whole new way of running your sales and marketing.

So, here are the...

7 Foolproof Secrets to Follow-up Mastery!

Here's the deal: if you'll apply these secrets to YOUR marketing, you'll get 2 – 4 times the number of deals from the exact same batch of leads you'd normally be spending long hours of the night worrying about until you give yourself an ulcer.

An outrageous claim, I know.... but let me be even more outrageous. Not only will you close a lot more deals from your leads, but you'll do it in less time, your margins will be higher and your job satisfaction will be greater than ever because you'll be selling your product or service from a position of respected authority!

I mean, whenever you come into someone's life, you've got the choice: "welcomed guest" or "unwanted pest." And we all know which one is most likely to make the sale, right?

Well, if you master these secrets you can do that. You'll literally transform your sales and marketing from a millstone around your neck into the next best thing to owning the keys to the US Mint!

So, where do you start?

Easy. At the beginning.

It all starts with marketing. Have you ever heard anyone say that the BIG money is NOT in selling products or services... it's in learning how to MARKET your products or services like a pro?

Well, it's true!

And if you're going to become a follow-up master and explode your profits in your industry – especially if you face stiff competition, market contraction, rising costs, or other challenges – you've got to think accurately about what marketing really is.

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"You'll literally transform your sales and marketing from a millstone around your neck into the next best thing to owning the keys to the US Mint!"

SECRET

1

The REAL Definition Of Successful Marketing

There are three and *only* three factors that really have an iron grip on the profits of any marketing effort. The smartest marketing minds on the planet have boiled down these factors to this simple, but incredibly powerful formula:

"The Right Message... To The Right Market... At The Right Time!"

Most businesses miss one, two or all three of these factors, and as a result, have very ineffective marketing and advertising results. Heck, just miss one of them and you're looking at the wrong end of a marketing disaster.

It's like a three-legged stool: take any one of the legs away and you're flat on the ground, right?

Also, most businesses magnify these problems by spending a bunch of money on image advertising, with no direct response offers at all. I mean, advertising your brand is great if you're a gazillion-dollar company (or you're an ad agency with a gazillion-dollar company paying your fees), but it's business suicide for the rest of us!

The objective of your marketing efforts is to generate leads – people you can follow up with. When you convey the right message to the right market at the right time, you get leads... and that's where the whole follow-up mastery business begins.

The result of not using the three marketing success factors and having little or no direct response offers, cost companies millions in missed sales every year!

Here's how to simply fix this:

1. Never waste money on image advertising, or at least keep it to a minimum and only try creating yourself or your company as a brand after becoming profitable!
2. Test simple, inexpensive direct response marketing methods, offering FREE reports on different topics, samples, coupons, or other response devices filled with emotional response copy to find the messages that match the interests of YOUR target markets!
3. Concentrate on your most successful direct response offers.

4. Follow up to maximize sales! It is CRITICAL that you follow up with each lead repeatedly, incorporating a variety of media such as mail, phone, fax, email messages, and voice broadcasting! More on that in a minute.

A few words of warning: if you don't have a computerized system in place to consistently and effectively follow up with your leads, you're wasting a lot of leads and you're wasting a lot of man hours doing tedious, manual follow-up.

"...if you don't have a computerized system in place to consistently, religiously and effectively follow-up with your leads..."

"It is **CRITICAL** that you follow-up with each lead repeatedly..."

SECRET

2 "Cherry Picking" and The Three Types of Leads

Every time you run a marketing campaign, the leads you get can be divided into three categories:

1. Leads ready NOW (Hot)
2. Leads not ready now but will be ready soon (Warm – these leads are **CRITICAL** to your success)
3. Leads that may never be ready (Cold or Bad Leads)

The problem is, you can't divide the leads into categories because you don't know which leads go into which categories. So, you or your staff members call every lead once or twice and then you spend the time with the leads that look like they're going to close.

Every smart sales person that works on commission does this – **they go for the low hanging fruit!**

That's right. They basically cherry pick! Cherry picking is the natural result here because:

- A. Sales reps are paid high commissions for a sale
- B. You can't tell the difference between warm leads and bad leads until you reach them
- C. If you **DO** reach the lead and the timing isn't right, you don't have the time or patience to constantly follow up

There's nothing wrong with spending your time with hot leads. **The problem of cherry picking comes when you neglect all those warm leads!**

Of course, everyone says they're going to follow up with the other leads *one of these days*, but the fact is, you don't do it.

Or, if you do follow up, you don't do it consistently and effectively because, quite frankly, it's a royal pain in the neck.

Instead of doing the tedious follow-up grunt work, sales reps usually wait for a new batch of leads to come in. In the meantime, the warm leads from the last batch get cold and they are soon forgotten. Simply put, they slip through the cracks.

Now, you know you need a system to follow up with these

leads. You need something or someone to do your follow-up like clockwork, whether you're on the phone, in a meeting or on the golf course. You know. Remember the *Terminator*? Relentless, tireless, and unstoppable? Well, that's what you need your follow-up to be. Consistent and effective.

Over the years, you've probably tried a number of different schemes to follow up or re-market to your leads. If you're doing this, chances are you're finding an occasional needle in the haystack.

But you can do so much better!

Your follow-up doesn't have to be hit and miss. You can get more out of your leads than you're getting right now. And when you do, your profitability will soar.

"...staying in front of the prospect – is probably the single greatest challenge in your business."

"Most people tinker with their message and their market and end up with something that works okay. But they forget how critical timing is in the whole mix."

SECRET

3

Timing is Everything!

You'll notice that Secret #3 is closely associated with Secret #1 (the right message to the right market at the right time).

Most people tinker with their message and their market and end up with something that works okay. But they forget how critical timing is in the whole mix.

See, they simply forget this one simple truth:

People buy when they are ready to buy, not when you are ready to sell.

And this means, by definition, **you have to be in front of folks when they're ready to buy.**

In other words, you have to follow up with them... consistently!

Because if you don't, someone else will land that business.

And guess what? That "someone else" who lands the business will be your competitor, who either followed up consistently; or (more likely) got lucky enough to cross paths with your prospect at the right time.

You don't want to leave new business up to chance, not unless you like being poor or losing to your competitor. No one does! But the one thing you control in this situation – staying in front of the prospect – is probably the single greatest challenge in your business.

I talk with folks all the time who tell me they know they should stay in touch, follow up and "be there" for their prospects and customers, but they just can't seem to get a system in place to do that.

The fact is, 'follow-up' is a gut-wrenching, time-consuming, tedious and labor-intensive task that is almost impossible for the human mind to keep straight!

So, businesses everywhere have concocted half-baked schemes, spreadsheets, tickler files, software programs, and who knows what else to help them with this **all-important function of their business.**

Can you imagine it? I mean, it's like being wheeled into the operating room for a triple bypass and seeing the surgeon and his team standing there with a bunch of

carpenter's tools. Just fills you with confidence, doesn't it? Unfortunately, most businesses do follow-up like this (if they do it at all) and most of their schemes and techniques are spectacularly unsuccessful.

As a result, businesses everywhere leave *huge piles of money* on the table every month. They continue to throw away good money on leads, only to let the majority of them drop through the holes at the bottom of the bucket because the timing wasn't right for those folks. For cryin' out loud, **PLUG THE HOLES AT THE BOTTOM OF THE BUCKET!**

But hey, if you find yourself falling into this trap, you're in good company! According to one publication, over 99% of small businesses do not consistently follow up with their prospects and customers.

The good news is that you can easily annihilate this problem... and when you do, you'll see a massive jump in your profits.

"...businesses everywhere leave huge piles of money on the table every month."

"Would you like to come into the office and pluck ripe fruit off the tree..."

SECRET

4 Transform your Sales Strategy from Outbound "Hunting" to Inbound "Harvesting"

This secret is critical to your success because it puts you in a position to land customers quickly. It shortens the sales cycle, increases your capacity to handle more deals or sales and improves your closing ratio because you spend more time talking to highly qualified prospects.

Think about it:

Would you like to come into the office and pluck ripe fruit off the tree... or would you rather spend your time hitting the phones hard, chasing leads and talking to lukewarm prospects?

Let me put it another way. Would you rather go to the store and manhandle the refrigerator out in the lot, into your car, drive it home, then manhandle it into your kitchen... or would you rather pay a few bucks to get a couple of trained delivery people to do it for you?

Well, going out "hunting" for business is about as easy and rewarding as carting your own refrigerator home. And it's not just the pain and effort of doing the chasing either! Oh no. There's some pretty subtle psychology at work here.

See, when you're in "hunting" mode, you're dialing for dollars; you feel resistance at every turn; rejection is common; you get "price shopped" against competitors; and you waste tons of time working with leads who simply aren't ready.

Sounds about as much fun as major root-canal without the anesthetic, doesn't it?

On the other hand, when you're in "harvesting" mode, you're working smart and scooping up sales left and right. You're like the expert fisherman with the irresistible bait, drawing your prospects to you.

You can spend your time closing deals on the phone with hot leads or out on the golf course because you know your prospects will call YOU when they're ready to move forward.

So, the BIG question is... how can you spend more time working with hot leads and less time – even NO time – with cold leads?

How can you actually make the shift from hunting to harvesting?

To understand how to do this, you need to know about a fundamental business problem at the heart of nearly every company in the world.

The problem is this: how does a company balance its marketing and sales efforts?

You see, in most companies, the marketing department's job is to get the leads and the sales department's job is to call on the leads and close the sale.

But in between getting the lead and closing the sale there's a huge gap.

If you close the gap, you'll make the shift from hunting mode to harvesting mode... and your profits will skyrocket.

To make the shift, you need to recognize right now that:

- A.** Marketing's job doesn't end when the lead is acquired
- B.** The sales job doesn't begin and end with a "heat check" phone call to each lead
- C.** Someone (either Marketing or Sales) has to be in charge of warming the leads that aren't hot right now but will be hot down the road

In other words, if you want to explode your profits, the functions of marketing and sales must come together!

Otherwise, your marketing department is flushing money down the toilet on leads that aren't hot right now. Imagine tearing up \$100 bills and flushing them away!

Then, your sales department is wasting time and money trying to close sales with prospects who aren't ready.

And if you're a one-person business or a really small shop, you're the marketing department and the sales department, so you're wasting money and time. No wonder it's so tough to take your business to the next level!

To sum up this problem of the gap between marketing and sales, think of it this way; every business has a lead-generation department (marketing) and a lead-closing department (sales), but they're lacking a lead-warming department. To bridge the gap between marketing and sales and thereby make the shift from outbound

"You can spend your time closing deals on the phone with hot leads or out on the golf course because you know your prospects will call YOU..."

"You'll enjoy your work more, you won't dread pounding the phones, and you'll have more freedom..."

hunting to inbound harvesting, you need a lead-warming department. Simple as that.

So, now that you understand the task at hand, let me give you five tips to make the shift:

1. Send relevant, valuable information to every prospect regularly, relentlessly and frequently. You need to be doing this until they buy, die, or beg you for mercy!
2. Communicate with prospects efficiently, aside from the normal, time-consuming, one-on-one methods.
3. Log all communications between your office and the prospect in an organized fashion.
4. Arm yourself and your sales reps with an arsenal of specific information you can send to prospects on request.
5. Track the progress of each lead through the sales pipeline, so you always know where every lead stands.

The good news is that it's actually very easy to do all of this... *and* you can have it done for you *effortlessly* with an automated system.

Whether you're a one-person shop or a fast-growing small business, you need to find out how to make this shift. And when you make this shift, **you'll be amazed at the results!**

You'll enjoy your work more, you won't dread pounding the phones, and you'll have more freedom, all because your prospects will call YOU when they're ready.

The bottom line is this: you'll close more deals, make more money, and do it all in less time... and ditch the grunt work.

SECRET

5 You Must Have a Living, Breathing Customer Database

If you're like most small business owners, you want to build a business that doesn't rely heavily on outside marketing efforts. You want to maximize referrals and repeat business so that you don't have to spend your time chasing down leads and convincing folks that they should do business with you.

I talk to entrepreneurs every day who dream of having a mature customer base that provides them with lots of repeat business.

But when I ask them what they're doing to make that dream a reality, too often they answer with something like:

"Well, Clate, the longer I'm in the industry, the more customers I will work with and the more I'll get repeat business and referrals."

When I hear that, I think to myself, "Uh-oh!!!" Why? Because that is a very passive mindset that can cost you millions of dollars over the course of a business! Plus, the odds of total business failure are high when the owner is stuck with that mentality.

You see, as the months go by, your past customers just aren't thinking about you anymore! That's the cold, hard truth. And no matter how great your product or service is, your customers are busy living their lives. Chances are, they won't remember you.

And they definitely won't mention your name at the next family picnic when Uncle Jack starts talking about the pains your product or service fixes.

Am I saying that good service won't help you get a referral here and there? Of course not!

What I am saying is that if you want a strong customer base that is the backbone of your business, you must actively, systematically and methodically *build your customer base*.

Your "living, breathing, customer database" is much more than the prospect and customer records in your spreadsheets or file cabinet.

"...as the months go by, your past customers just aren't thinking about you anymore!"

"...a living,
breathing
customer
database gives
you a powerful
asset you can
use to grow your
business..."

It's more than your Outlook files or your contact management program.

Apart from being the very lifeblood of your business, worth more than any amount of stock, real-estate, or intellectual property, your customer database is everything you know about every contact, every prospect and every customer combined into one, easy-to-use computer program.

Think of it this way:

Without a customer database, you don't have a customer base. You have a customer graveyard!

On the other hand, a living, breathing customer database gives you a powerful asset you can use to grow your business over the years. A good database is usually worth *millions*. Literally.

So, what do I mean when I say you need a "living, breathing customer database?"

Well, you need to actively build your customer database every day, every week, every month!

All of your contact, prospect and customer data, order and billing info – everything – needs to be entered and stored in the database.

You need these people organized into meaningful groups. And you need the flexibility to sort through the database so that at a moment's notice you can pull up prospects or customers who might bring you more business.

For example, you might want to pull up a list of all customers who purchased product x within the last 12 months but did not purchase product y. Or, you may want to look at all prospects you worked with over the last six months who didn't do business with you because of a specific reason.

Your data can be sliced and diced in countless ways to give you the names of prospects and customers who are likely to respond to a particular product or service you offer.

And when you combine a solid customer database with the power of consistent, effective follow-up, you have the ability to land TONS of new business in a short period of time.

You can *effortlessly* run a customer loyalty campaign, keeping your name in front of customers and keeping

repeat business and referrals coming your way. And that means getting maximum value from your customer base.

In short, you can cultivate a relationship with your customers and prospects, which will bring you business when they (or their friends) are looking for your product or service.

So, to summarize, here are the benefits that come when you have a good customer database:

- You are organized. You know what to do, who to do it for and when to do it.
- You are professional because you do what you say you'll do.
- All important information about your sales and marketing is stored in one place.
- You deliver superior service because all customer data is in your database.
- Past customers remember you. They come back and refer their friends to you.
- And best of all, you have a money tree you can shake on demand when you want more business.

Now, you might be thinking that it's a pain in the neck to build a customer database. But it's actually very simple.

In fact, most database vendors can help you import all of your critical customer information right into your customer database so that you don't have to spend time typing it in.

Then, on a daily basis you just need to enter new information about your contacts, prospects and customers.

When you do this, you'll have a base of people that you can *talk to* to generate interest in your services. You can do marketing broadcasts, loyalty campaigns, special announcements, newsletters, courtesy calls, and much more. The sales and marketing possibilities are endless when you have a strong customer database!

If you put into practice this important marketing secret, your customer database will become your #1 asset, bringing you added business for weeks, months and years into the future.

"The sales and marketing possibilities are endless when you have a strong customer database!"

"...over 99% of small businesses don't properly follow-up."

SECRET

6

Education, Repetition and Variety

I've repeated the phrase "consistent and effective follow-up" over and over. This secret is about what that means. But first, let's talk about what NOT to do.

Most small businesses market their products and services like this:

- Step 1.** Buy a bunch of leads or generate leads with a mailer or other campaign
- Step 2.** Distribute leads to sales reps
- Step 3.** Call on the leads to find the hot ones who are ready now
- Step 4.** Work with hot leads to close a quick deal
- Step 5.** Throw away, postpone or neglect the leads that aren't hot
- Step 6.** Repeat the process

Just about every business on the planet does this. And it's not bad... until you realize how much money you're leaving on the table. The fact is, for every deal you close using this common process, there's another 2 to 3 deals (or more!) you *could* close.

That's a pretty outrageous claim! So, how do you do that? Well, that's what Secret #6 is all about.

How to properly follow up using education, repetition and variety!

You see, over 99% of small businesses don't properly follow up. Why? Because they don't have a system, they don't have time, they don't know how valuable it is, and the truth is, **they don't know how to follow up!**

That's okay, because no one expects you to know how if you haven't been taught!

But what you can do is learn from the best minds in direct response marketing, people like Dan Kennedy, Gary Halbert and Jay Abraham. These guys are masters of the direct response marketing profession and they know how to maximize sales. By applying their direct marketing principles to the mastery of follow-up, my company has helped thousands of people.

Let's talk about how to apply these direct marketing principles in the discipline of follow-up.

First, you need to understand that a couple of random follow-up phone calls to each lead will help you close more deals, but it's not going to produce big numbers. Plus, it's time consuming, tedious and discouraging.

Instead, your follow-up must take a combined approach that incorporates these three elements:

- 1. Education.** Your follow-up must inform your prospects and customers. You need to provide valuable information. If you're showing up with no value, you'll wear out your welcome fast. You need to communicate that you are on their side and deserve to be trusted. You'll accomplish this if you provide them with accurate, insightful information. Fact is, the sales process is confusing and intimidating for your customers. They want to trust you. Give them the information they need and you'll earn their trust. Help them. Serve them. Provide information and they'll appreciate you for it.
- 2. Repetition.** It's a proven fact that human beings have to hear the same thing over and over before it sinks in. Marketing and sales is no different. You know your products and services like the back of your hand, but your customers don't get it the first time they hear the message. Don't make the mistake of thinking that if a prospect heard the pitch once, they understood it. Chances are, they didn't. Tell them again, and again and again.
- 3. Variety.** This doesn't mean you vary your message! You need to consistently tell your message, but your follow-up delivery needs variety. To maximize your sales, **you must use multi-step follow-up sequences that incorporate and orchestrate direct mail, phone, email, fax, voice, and other media!** Some prospects will respond to your phone call, others to your email or letters, and others to your fax or voice messages. Serious power comes when you contact your prospects using multiple methods.

So, in a nutshell, Secret #6 says that proper follow-up requires you to repeatedly contact the lead or customer, providing valuable information via direct mail, phone, fax and email messages.

"...a couple of random follow-up phone calls to each lead will help you close more deals, but it's not going to produce big numbers."

"...proper follow-up requires you to repeatedly contact the lead or customer, providing valuable information..."

Now, until recently, there were only six secrets to follow-up mastery. But after watching this magic at work in countless businesses, including many businesses that don't work with my company, I came to realize there is a seventh secret. And it's probably the most important one of all.

You see, I started to notice that many businesses were mechanically applying the six secrets. They were getting results – good results – but others were getting far superior results.

To put it into context, I was seeing small businesses using the six secrets growing quickly, at the rate of 40, 50 or 60% per year. Not too bad. But I was seeing other small businesses growing at crazy, break-neck speed. I'm talking about 100%, 200%, even 400% PER YEAR! They were practicing the six secrets of follow-up mastery, but they seemed to be doing something more.

And then it hit me.

The ultra-successful entrepreneurs, the ones growing their companies by 2x, 3x and 5x per year, were using a seventh secret in their follow-up, a secret so effective that, when practiced, it exponentially improves the techniques (and the results) of the other six secrets.

SECRET 7 Personality, Genuineness and Entertainment

Your prospects and customers need information. They need repetition. They need education.

They need variety and frequency. They need to hear the right message at the right time.

That's what they need. And if you provide it, if you practice the six secrets, you'll see great improvement in your business.

But if you want phenomenal results, you need to give them what they want.

What they want is YOU! They want your personality. They want you to be real with them. They want you to be straight up, helpful, sincere. They want your spin, your angle, your advice, your perspective. They don't want corporate dribble. They want YOU!

And when you give them what they want and combine it with what they need, you've got something spectacular, even entertaining. You've got permission to converse freely with your prospects and customers, to help them with the things they need, to offer them the products and services you provide that make their life easier, better, more successful.

It's kind of funny. All those clichés about being yourself and finding your groove and letting your light shine are all at the heart of Secret #7.

I can't tell you how to be you, how to be real. Only you can determine that. But I can tell you how to inject personality into your follow-ups. **Here are a handful of suggestions:**

- Use conversational language, not corporate speak
- Laugh at yourself and your mistakes
- Don't compartmentalize your business and personal lives – discuss the stuff of your personal life with your prospects and customers
- Talk about what you like, what interests you, what annoys you
- View your prospects and customers as friends. Try it! It's incredibly refreshing and liberating (If this is hard

"They want you to be straight up, helpful, sincere. They want your spin, your angle, your advice, your perspective."

"...this seventh secret is the key to phenomenal results."

for you, ask yourself why you're serving this group of people in the first place)

- When you're thinking about the world around you and how it affects you, wrap those thoughts into your follow-up conversations
- Use analogies that are interesting to you. Chances are, they're interesting to your prospects and customers
- Read, learn and study... and then share your discoveries

It can be difficult at first to do this. But I am convinced this seventh secret is the key to phenomenal results.

Now, if you're telling yourself, "I can't do that," then I want you to do three things:

1. Slap yourself upside the head for allowing that negative thought to take root in your brain and your heart that knew how long ago
2. Resolve to give it a shot, realizing that it's a learning process
3. REMEMBER that while you're learning how to do Secret #7 well, the other six secrets will drive tremendous results for your business.

Okay, so that's it. Those are the seven secrets that, if practiced, will make you a master of follow-up. You're probably wondering how to put it all together and make it work for your business. It might seem a bit overwhelming and complicated.

So I'm going to give you a template sequence you can use for following up with prospects.

YOUR infallible 14-step Plan to Follow-up with Prospects

Keep in mind that the biggest problem with any kind of marketing today is dealing with unqualified prospects. So this sequence will help you get the right prospects and then follow up with them over time (until the timing is right for your prospect).

The very best way I know to attract the right prospects is to offer something of value to your target market (i.e., speak to a problem that keeps them up at night) and get people to raise their hand and say "Yes! That's me! I want to learn more about that!"

And when they do, you send them...

The FREE REPORT or WHITE PAPER that can be a vital tool in your marketing toolkit.

Look, like I said, this is NOT rocket science.

For years, actually decades, direct-response marketers have been using the concept of a Free Report as bait to attract prospective customers.

So, here's how it works. Your lead generation marketing offers a free report or white paper. Interested prospects request the free report, and receive the free report along with additional follow-up. Simple, isn't it?

So bearing in mind the Seven Secrets to Follow-up Mastery, I'm now going to show you how a great campaign might work. And this campaign WILL bring home the bacon, I promise, IF, and ONLY IF, you actually DO it!

Clate Mask's Million-Dollar, 14-Step "Free Report Follow-up Sequence"

1. Visitor requests the report from your website (you capture the visitor's name, fax, email, telephone, and mailing address).
2. **Immediate:** Email confirmation sent to prospect thanking them for requesting the report.
3. **Same Day:** Print fulfillment company receives notice to mail the free report to the prospect (will arrive on day 3 or 4).
4. **Day 3:** Send a "Watch Your Mailbox" fax. When it

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arrives, it tells the prospect to check his or her mail for the free report arriving today or tomorrow.

- 5. Day 4:** Send a "Watch Your Mailbox" Voice Message. Your prospect receives a voicemail from you reminding them the free report soon will be arriving.
- 6. Day 4:** Free report arrives by mail, along with a special offer that expires 30 days from the initial request.
- 7. Day 7:** Follow-up email arrives. It asks if they read the report, and whether they have any questions.
- 8. Day 9:** Testimonial postcard arrives (which addresses and overcomes a common objection).
- 9. Day 14:** Second Notice Letter Arrives. This includes the free report again and reminds them that they have a limited time to respond. Also includes a special bonus offering for responding sooner.
- 10. Day 23:** Testimonial postcard 2 arrives. Helps overcome another common objection and reminds them they have only a few days left to take advantage of the offer.
- 11. Day 28:** "Time is Running Out" email sent.
- 12. Day 29:** "Final Notice" fax sent.
- 13. Day 33:** "Why Didn't You Respond" survey sent.
- 14. Beyond:** Send additional follow-up (weekly or monthly, depending on how good your information is) for 23 more months AT LEAST!

Now, this is simply a template you can use. You may need to modify the spacing of the steps to suit your needs. But once you've got your follow-ups written, you're ready to go.

I do need to offer two words of caution:

CAUTION #1: You'll be tempted to say that your prospects will get mad if you follow up this much. Don't fall into that trap. First of all, they won't even read most of the steps you send, for whatever reason. Second, if you're boring and the information you give provides no value, you might be right. So, make sure you've got valuable information... and try not to be boring or you'll have to spread out your communications. In other words, the more boring you are, the quicker you become an "unwanted pest."

CAUTION #2: When you put this into practice, you WILL begin to receive inbound inquiries by email, phone, web, etc. Be sure that you have a mechanism in place to handle the inquiries. Of course, it's a good problem to have, but it's a problem, nonetheless.

All right, so you're probably thinking, "Well, this seems pretty easy. What's the catch and why don't people do it?"

Because it takes a bit of work and a bit of discipline. See, unless you're using some kind of automated system for this, you have to do it manually.

And that means spreadsheets, calendars, scraps of paper... and a lot of panicking and running around. Here, let me explain.

Let's say this is the response for week 1 (i.e., the number of people who went to your website or called you to request the free report):

- Day 1 you get 10 requests
- Day 2 you get 16 requests
- Day 3 you get 27 requests
- Day 4 you get 1 request
- Day 5 you get 68 requests
- Day 6 you get 32 requests
- Day 7 you get 17 requests

So here's what you have to keep track of, day by day:

Day 1: Send reports and email confirmation to the Day 1 Responders.

Day 2: Send reports and email confirmation to Day 2 Responders.

Day 3: Send reports and email confirmation to Day 3 Responders plus the "Watch your mailbox" fax to Day 1 Responders.

Day 4: Send reports and email confirmation to Day 4 Responders, plus the "Watch your mailbox" fax to Day 2 Responders, plus "Watch your mailbox" voice broadcasts to Day 1 Responders.

Day 5: Send reports and email confirmation to Day 5

"When you put this into practice, you WILL begin to receive inbound inquiries by email, phone, web, etc."

"...if you think it's complicated to just READ through what you've gotta do, imagine actually trying to DO IT!"

Responders, plus the "Watch your mailbox" fax to Day 3 Responders, plus "Watch your mailbox" voice broadcasts to Day 2 Responders.

Day 6: Send reports and email confirmation to Day 6 Responders, plus the "Watch your mailbox" fax to Day 4 Responders , plus "Watch your mailbox" voice broadcasts to Day 3 Responders.

Day 7: Send reports and email confirmation to Day 7 Responders, plus the "Watch your mailbox" fax to Day 5 Responders , plus "Watch your mailbox" voice broadcasts to Day 4 Responders.

Day 8: Postcard for Day 1 Responders arrives, plus Send follow-up email 1 to Day 1 responders, plus Send Reports and email confirmation to Day 8 Responders, plus the "Watch your mailbox" fax to Day 5 Responders , plus "Watch your mailbox" voice broadcasts to Day 4 Responders.

Day 9: Postcard for Day 1 Responders arrives, plus Send follow-up email 1 to Day 2 Responders, plus Send Reports and email confirmation to Day 8 Responders, plus the "Watch your mailbox" fax to Day 6 Responders, plus "Watch your mailbox" voice broadcasts to Day 5 responders.

Sound complicated yet? Well, we're just getting started! Because if you think it's complicated to just READ through what you've gotta do, imagine actually trying to DO IT!

Now imagine what happens when you are 60 days into this, and you have dozens, hundreds or even thousands of people you're trying to follow-up with! And then your assistant goes down with the flu and all of a sudden you're up to your armpits in...stuff...and you don't have a clue how to handle it.

I don't know about you, but for me the word nightmare springs to mind, quickly followed by heart attack! Then imagine what happens when you add in the "New Customer Relationship-Building System" and the "Customer Referral Generating System" and the "Customer Testimonial System."

Let's just say it doesn't get easier!

Don't get me wrong. My "14-Step Free Report Follow-up Sequence" for prospects WILL convert a lot more of your prospects into customers. It is simple, straightforward and

effective. There are people out there right now using it to quickly and profitably grow their businesses!

It's just a pain to manage once your list starts to grow and your marketing gets more sophisticated.

Because here's something I haven't told you: once you start marketing this way, you'll be hooked!

Quite simply, you're going to love the way your cash registers start to ring, seemingly without effort on your part, and certainly with a whole lot less stress. You'll be falling over yourself to build ever bigger, more powerful and more numerous marketing campaigns.

Seriously. Once you realize the more often you *prod* your list, the more money you make, you won't be able to leave it alone. You'll be constantly worrying over it like a terrier with a juicy bone.

And that's when you will find a manual system becomes really unwieldy.

As you know from my story at the beginning of this Guide, my team and I have designed a software program to solve the challenges of implementing proper follow-up sequences. Our product is called Infusionsoft and it is built specifically to handle multi-step follow-up campaigns exactly like the one I describe above... easily and effortlessly. Of course, Infusionsoft does a ton of other stuff to help entrepreneurs, marketers and small businesses grow quickly and profitably, but that's a discussion for another day.

Suffice it to say, calling Infusionsoft "Customer Relationship Management Software" is like saying Bill Gates is "worth a few bucks." I mean if you've used ACT!, Goldmine, or Salesforce.com, you're probably expecting the same-old same-old. If you check out our software, you'll certainly see that there's nothing out there like Infusionsoft.

I want you to be successful in your entrepreneurial pursuits. I want you to quickly and profitably build your business. You don't need to hire a team of sales folks and telemarketers to follow up with your leads. But you DO need to follow up.

Whether you use Infusionsoft to manage it all or you do it manually, I encourage you to do it. I know from personal experience and from observation in hundreds, even thousands of businesses out there, that follow-up is the

"It is simple, straightforward and effective. There are people out there right now using it to quickly and profitably grow their businesses!"

"Our product is called Infusionsoft and it is built specifically to handle multi-step follow-up campaigns exactly like the one I describe above..."

key to growing your business. Neglect it at your own peril. Adopt it – the way I've instructed you – and you'll be amazed by the results.

The quickest and easiest way to experience exactly what Infusionsoft can do for you and your business is to jump on the Internet and type "**www.infusionsoft.com**" into your web browser. Once there, you can view a brief description of our product. After picking up your jaw from your keyboard... watch our on-demand demo. Then, one of our marketing automation experts will walk you through the software and answer your questions about how we can solve lead generation, follow-up, lead conversion, and customer management challenges specific to YOUR business.

www.infusionsoft.com

See what just a few of our customers have to say about Infusionsoft...

"I'm a huge advocate of entrepreneurialism and believe that the best investment is in your own business."

– Cliff Jones, CEO and Founder of WealthNet Partners, LLC

"The Infusionsoft product is incredible and made a huge difference in my business. In the past two years we've experienced remarkable, exponential growth that wouldn't have been possible without Infusionsoft. We've gone from 3 to 10 staff members, increased our revenue from zero to \$2 million a year, and launched a Web store last July using Infusionsoft. Now, we use Infusionsoft to manage all our marketing, follow-up and ecommerce, which has been truly awesome. We've been huge advocates of the power of this product, and 40 of our customers now also use Infusionsoft to great success. And, on top of it all, the people at Infusionsoft are just great people and working with them to grow my business has been wonderful."

– Sean Greeley, Net Profit Explosion

"Infusionsoft is an absolute gem. I literally had nothing when I purchased Infusionsoft and created an enterprise that grossed \$2.4 million in just one year!

Infusionsoft works. If you are committed to investing in the software and to putting in the small effort it takes to set up the system, it's worth it. Once Infusionsoft is up and running, you can coast, you can ride the wave! Let it work for you."

– Dan Bradbury, www.danbradbury.com

"I am fascinated by how the software has made my life so much easier. I am a mom who sometimes works in my sweatpants, but between the 800 number and auto responders, I have this constant business presence. Infusionsoft provides me the support I need to be an entrepreneurial mom."

– Kim DeYoung, Metromom.com

"I understand that there are other companies that provide services similar to Infusionsoft, but I will not settle for second best. I only know what the best does for my company, which is why I will use this software application forever."

– Charles Mack Jr., V.I.P. Auto Appearance Center

About Infusionsoft

Infusionsoft, the leader in marketing automation software for entrepreneurs and small businesses, is revolutionizing the way they grow. There are 25 million small businesses in America that need an easy-to-use, affordable, and powerful software solution that increases sales while freeing up their time. The company's integrated marketing automation software addresses that need by helping small businesses automatically convert more prospects to customers, get repeat sales, and grow their business without growing staff. The privately-held, Inc. 500 company, based in Gilbert, Arizona is funded by Mohr Davidow Ventures and vSpring Capital.

For more information, visit www.infusionsoft.com.