

# THE MARKETING & TECHNOLOGY ROADMAP

17 STRATEGIES TO AUTOMATE  
& EXPLODE YOUR BUSINESS

AN  
ULTIMATE  
MARKETER'S  
GUIDE TO  
SUCCESS



MARKETING  
AUTOMATION GROUP

**Bob Britton**



## **Bob Britton's Marketing & Technology Road Map**

### **How To Generate Explosive Business Growth, Incredible Profits And Create Raving Fan Customers At The Same Time.**

**(17 Essential Leverage Points)**

Before you jump in and read what I've put together here, let me take just a moment and explain to you how I came to write this roadmap and why you should pay close attention to what I've written here. If you take the time to read and absorb what I've laid out for you here, you will be able to rapidly and easily grow your business and profits.

Since the ripe old of age of about 10, I've been an entrepreneur, beginning with my first attempt at business, selling greeting cards door to door. Since then I've started and eventually closed multiple businesses, working hard to grow each one and learning some tough lessons with each one. All the while, I believed that exceptional customer service and doing a good job would bring me all the business I could handle.

It didn't.

I struggled to make ends meet for years, and it seemed like no matter what I tried, nothing had any real, lasting effect on my business growth. In fact, what happened most often was I spent a bunch of money I didn't have, hoping that a new advertising or marketing idea would pay off.

They never did.

And when I say I've tried it all, I mean it. I tried direct mail, yellow pages, newspaper ads, Valpak, penny saver, TV, Community calendars, town maps, billboards, heck I even went door to door and handed out flyers in my neighborhood! You name

it, I tried it, hoping and praying that my efforts would bring me a flood of new customers, and some REAL money. Nothing I tried ever really gave me the lift I was hoping for.

This is pretty much how things went for quite a few years, working really hard for very little money, until one day I discovered direct response marketing. I learned about this 'new' (it was actually just new to me, it's been around since the beginning of business) type of marketing and advertising that had the potential to predictably bring my business a flood of high profit customers. I dove into this stuff head first, and learned everything I could about how to create marketing and advertising that actually worked. I read books, went to special workshops and seminars and poured myself into learning the ins and outs of creating marketing and advertising that worked like magic. To date I've spent hundreds of thousands of dollars on my education in this area. I learned the key elements that make up a direct response marketing piece and how to put them together to maximum effect. Then, I started to implement these ideas into my business and the effect was dramatic. At the time direct mail was the most effective way to get new customers (this was when the Internet and PPC was still in its infancy) and using what I'd learned I started crafting and testing different marketing messages and offers.

And then it hit!

In all the years prior, any direct mail piece I would send out would be considered 'successful' if I got a 1% response rate. Not that this 1% made me a dime, but that's what the 'industry' reps told me was standard, and I accepted it. After learning direct response as well as many advanced marketing techniques, I put together a marketing piece that is unlikely ever to be topped. It consistently got 20 - 25% response each and every time I sent it. To this day there are many people I shared this with that are still using it. Not only that, I went from barely making ends meet to living large. FINALLY, I had a system that predictably brought me the right kind of customers, day in and day out. My business literally exploded. I went from yearly sales of \$250,000 to about \$1,000,000 in less than 18 months! So I opened another location, and grew that from zero to

nearly \$500,000 in less than 2 years. All this was very exciting, but I wasn't done yet.

To understand what I'm going to share with you next, a little background is in order. I've always been a computer geek. Having my first Commodore 64 in my parents basement when I was 14, and playing and learning to program that thing for hours and hours on end. When other kids were outside playing baseball, I was in that basement 'hacking' away. I loved it. Loved what I could make that computer do. So, from the very instant the internet came around, I took to it like a fish in water. And, when Infusionsoft came around a few years later, I was able to instantly see the value and capitalize on it immediately, no training necessary.

I took Infusionsoft (which at the time was a 5k upfront investment) and in just a few months automated many of the marketing systems that were manual processes before. I was able to cut staff, and get better, more consistent results. Again, my business exploded we went from about 500k to nearly \$1,000,000 in my new store, all with LESS staff. Profits soared and life was good.

All this success lead me to share this story at Infusioncon 2010 and eventually winning the Ultimate Marketer Award.

Meanwhile I had automated much of my business and it was for the most part on 'auto pilot' and I was getting bored. I decided to start helping other business owners learn and implement these ideas and principles into their businesses with a special focus on using technology and Infusionsoft to increase profits. I founded Marketing Automation Group, and it's been amazing ever since. My clients on average see a 2x to 3x increase in sales and profits by following my advice and modeling my business systems. I've had the privilege of working with some amazing, and super talented individuals and helping them realize their full potential. I've even been able to coach a few people to millionaire status. It's very exciting stuff. In truth, helping OTHER people achieve success with the money and free time they deserve is what drives me today and has become the reason I've written this roadmap.

What you will read here is a small sampling of the hundreds of marketing ideas, systems and philosophies I've picked up in my more than 20 years in business. I've started out with a few key fundamentals, and then go into more advanced ideas and strategies.

Please read what I've put together here and understand that the most important thing you can do in business is smart marketing. Smart marketing means placing the right message in front of the right target at the right time. This is at the core of each and every idea you'll see presented here.

As you read this business roadmap and list of essential leverage points, please keep an open mind. Each one may apply to you and your specific business differently. While I've tried to be as generic as possible, it's unlikely that your business couldn't benefit from these ideas in SOME way.

One of the biggest mistakes I've seen some of my clients make is having a closed mind to an idea. Once you mentally 'check out' from an idea you close yourself off to the possibilities. I have yet to find a business that couldn't benefit from these leverage points if the owner was willing to figure out how to apply them to their specific business. If I can do it, you can too.

Best wishes, and have fun using automation to grow your business and profits!

*Bob Britton*

P.S. If you would like to enjoy the many benefits of these powerful money making strategies (and many, many more) in your business in the shortest amount of time possible, then joining my MAG Platinum group is the smartest investment you'll ever make. Learn more here: <http://usethislink.me/PlatinumLearnMore>

P.P.S. When you're done reading these, I'd love to hear your feedback. Head over to my website at <http://marketingautomationgroup.com/marketing-and-technology-roadmap/> and tell me what you think.

## **Leverage Point #1:**

### **New Customers (First Sale)**

New customers are the lifeblood of all businesses. Yet too often business owners treat new customers the same as everyone else. Taking the time to recognize and appreciate someone that has patronized your business for the first time is a high value investment of your time. By sending them something special, like a welcome video, or a welcome 'kit' you can begin to solidify your long term relationship with that client for years to come. Let them know that you care about them, and want to do business with them more than just one time. Give them an incentive to come back again quickly to help them get in the habit of doing business with you. This is also a good opportunity to 'train' your new client on how you communicate (do business) and what other programs and products you offer that they may enjoy. Remember: when one of our clients purchases something from someone else that we offer too, it's OUR fault, not theirs. Nine times out of ten, we didn't do a good job educating that client about the goods and services we offer, so they went elsewhere.

## **Leverage Point #2:**

### **Repeat Customers (Clients)**

The value of repeat customers CANNOT be overstated. The thing that so many business owners miss is the real cost of acquiring a new client. EVERY business that sells anything needs to acquire new clients, however, this is very, very expensive (and getting more expensive all the time). You have to find them, get your message to them and then get them to buy. All of that takes time and money and even if you're very profitable when you make a sale, you still have to start the process over again. It never fails, when I talk about the importance of repeat business from the same client, I have some knucklehead that wants to fight with me on this saying something like 'You don't understand, I only sell one thing and then I'm done, I don't have anything else for them to buy' to which I always give the same answer, 'Then change your product/service so there are up-sells, and additional options/features for people to buy'. If you can't think of anything additional to sell to your clients, then YOU have a big problem. You're not paying attention to your clients needs/wants and desires. Almost 100% of the time this means that the owner is solely focused on themselves and their product, instead of THEIR CUSTOMER! I don't care what business you're in (and this is especially true if you're in a small niche business) constantly looking for new customers to sell is a great way to work really, really hard for very little money. You want to make a dramatic change in your income? Start to focus on what your current clients' wants, needs and desires are, and then give that to them. Every human being has things that they want and need, your job is to identify them and fulfill that desire. I guarantee no matter how good your product or service is, there's something about it your clients don't like, or would like to see as an additional feature/benefit. Survey them, listen and find out what those things are, and then create a system to make offers to your existing client base to buy additional things from you. If you do not, you will NEVER be

rich, or make any serious money. The cost of customer acquisition is just too high.



## Leverage Point #3:

### Create Advocates (Raving Fans)

In and of itself, this isn't a leverage point per se, but it's something that you should be aware of and working toward as you build your business, so it's worth mentioning here. What's an advocate you might ask? It's someone that absolutely LOVES your business. They recommend you to their friends and family, they spend more money with you on a consistent basis, and are extremely loyal. I love advocates. I hope you have some in your business now, if not then it's time for you to think about creating them. How do you create advocates? You pay attention to your clients needs, wants and desires, and then you sell them what they want and deliver an amazing experience. It's actually not hard to create lots and lots of advocates, if you follow these 24 leverage points and put them to work. Each one is designed to WOW your clients in some way, and when you do a good job of that, their affinity for you and your sales will follow.

The fact is that an advocate will spend on average 20% more with you than anyone else. Amazon.com has proven this with their Prime membership. Did you know that Prime members spend on average \$1500 more per year than all other customers, and they PAY for the privilege! Sheer genius in my book. I love Amazon.com and I am a Prime member, getting deliveries from them almost daily. Why is my affinity so high for Amazon? Because they make it really easy for me to find what I want and need. They provide reviews of products from other customers, and make recommendations when I purchase something, 'people who bought this also bought'... this little thing has saved me time and money. Nothing more frustrating than making a purchase and then finding out days later that you don't have the thing you need to make it all work.

Do special things for your clients that nobody else does. Recognize them, and show your appreciation, just doing a 'good job' isn't good enough anymore. You want exceptional income? Create lots and lots of advocates and you'll never be short on cash again.

## **Leverage Point #4:**

### **Lost Customers (Haven't Seen Them In Too Long)**

A lost customer is someone that did business with you, bought your products or services and then hasn't been back for too long. What's too long? That truly depends on your business but you need to figure it out. Take last year's invoices and find out how many were repeat customers, then out of the repeats, what was the time between purchases? This should give you a good benchmark for when someone is falling into the 'lost' category. For example, let's say that you calculated an average of 6 months between purchases for those who did purchase more than once. So when it's been 8 months and a client hasn't purchased anything from you, this is a great opportunity to send them some incentive to do so. Make them a killer offer to come back and spend money with you again. This is a HIGH value leverage point because it's low cost to reach them and they're already familiar with your business.

This is a leverage point where the power of automation can really shine. Whether you process your sales through Infusionsoft or not, you can easily setup a custom field to store the date of last purchase. Then start a follow up sequence using that date and make the first step not until 8 months in the future (continuing with the example above). Just make sure that you re-set that sequence each time they do make a purchase.

Next send them a sequence of communications and make some offers to them (remember, no one can take you up on an offer you don't make). Reactivating them is usually easy (especially if you did a good job in the past, or they were happy with your product). People forget, they are busy and distracted by many, many things, help them remember you and your business and you'll make lots and lots of money and maybe even bring them to the advocate stage.

## Leverage Point #5:

### Dead Customers (Zombies)

I like to call this Zombification because I'm going to teach you how to raise the DEAD.

Why are you laughing?

Hey we ALL have dead clients. Not Dead Dead - We mean clients that don't come into your business anymore. It happens. Sometimes their needs change; sometimes their financial circumstance change, and sometimes, we change.

BUT the end result is a client who stops buying from you. Which is awful because we all know the effort it takes to get a client in the first place?

Now I don't want you to feel bad about NOT doing this stuff, but... Guess how many business owners have an active "Client Reactivation" plan?

1 in 1000... maybe...

Remember, Zombies are the living dead - Zombification helps them find their wallets again. By-the-way, how's this analogy working for you?

You might not even KNOW your clients are dead because you haven't established a standard for dead-ness. So, first things first - we need to make a list of who's dead and who's not.

If you've already established the criteria for a lost client by following leverage point #4, then figuring out this one should be easy. It's the same concept, taken a bit further.

Using the example from leverage point #4, we established that 8 months denotes a lost client. But what if you've got people in your customer list that haven't done business with you in more than a year or two? Then they are dead, and need to be

treated as such. Make them a phenomenal offer to come and see you again and you'll get great results.

But just making them an offer is ONLY one part to this leverage point. I've found that these people are a virtual TREASURE TROVE of information, if you're open to actually listen. You see sometimes, we did something ( or didn't do something ) that caused them to 'go away' in the first place. So just making an offer many times isn't going to work. You need to send these people a heartfelt survey and ask for their feedback ( and you can sneak an offer into the survey as well if you do it right ). The information you'll gather from their responses will help you FIX the reason they left in the first place, so you can 'stop the bleeding' from continuing. Sometimes the feedback you'll get isn't easy to hear, and I believe that's why many business owners don't ask for it, but if you can put your ego aside and be open to this, you can let your dead customers help guide you to a better and more profitable business.

Don't make the mistake so many business owners make, the 'I know what my customers want' mistake. You cannot assume that you know what your customers truly want, because all of us as business owners have a scotoma (a blind spot) when it comes to our own business. Other people can see what we cannot. The business owners that grow quickly and make the most money are the ones that are 'in tune' with their customers true wants and desires, and the listen and make adjustments accordingly.

## Leverage Point #6:

### Testimonials (Automated System)

If you're a savvy business owner, then you most likely already know you should be collecting testimonials. What other people say about you is infinitely more believable than what you say about yourself. I like to use testimonials everywhere, on all communications that go out from my business. Yet, having a systemized and organized way to collect them is something not many owners put much time effort or thought into. I love this leverage point because it's one that can be automated from start to finish using a few little known tricks.

First, put a web form on your website that collects the testimonial, you can either store the feedback in an Infusionsoft field or not. Then you drive people to that form each and every time they interact with your business, you know, when they make a purchase, call for information, or whatever makes sense. Send them an email asking for their feedback, and put a link to your form. If you've got a bricks and mortar business (as one of mine is) then leave a 'feedback' card for them to fill out with the web link and maybe even a QR code on it. The point here is to be proactive about collecting their feedback.

Next, with just a little bit of programming (or none at all if the budget isn't there) you can either 'approve' their feedback or copy and paste it to a page on your website. Over time you'll start to collect a long list of testimonials that you can use anywhere and everywhere.

Keep in mind that constantly adding new content to your website is good for your SEO, and in this case you'll be having your clients create it.

Now, let's get a little fancy. Let's say you created the form to collect their feedback, now you can have that web form trigger a thank you card and (optional) gift to be sent to that

person - Automatically every time the form is submitted. Boom! Automation system at work for your business, and you (or no one else) has to manage it.

As part of my [MAG Platinum program](#), I've created a custom Wordpress plugin that does this system turn key, and it has a whole bunch of additional features too. I've been using a system like this for years now, and it's fantastic, allowing me to collect hundreds and hundreds of testimonials without anyone having to 'manage' the system. You can check out the retail version of this plugin here: [Customer Testimonial Manager Plugin](#)

## **Leverage Point #7:**

### **Social Media (A Newcomer To The Marketing World)**

Ok I'll be the first to admit, just a short time ago, I was the guy saying 'nobody is making any money using social media' and that was a true statement. Fast forward just a couple of years, and that statement is flat out false. I'm now using social media to get leads and convert those leads into cash money, and I'm not alone. The tools now available to small business owners to explode their business using social media cannot be underestimated. There are many different tools now available that can help automate your posts and manage your social media campaigns. In my opinion, trying to think of what to write, or what posts to promote or managing your social media presence by yourself is a recipe for disaster. I've tried and failed and I understand technology and marketing at a level few people do. In my opinion, you need to add social media to your business marketing systems, but don't manage it yourself. Hire an outside firm to do it for you. There are many smaller very cost effective providers out there that can do a great job for you. If you're like me, it's the results you're most interested in, not adding yet another 'job' to your plate.

Here's the trick for making money with social media: Understand the task at hand, and have a clear game plan with multiple different marketing messages ready to go, then delegate the day to day to someone else and you just keep your eye on the results. The reality for most business owners is that they don't know what people will respond to or not. So it's going to take some testing and tweaking to find the message that resonates with your social media audience. So, be prepared with several different angles and messages and then get to work testing them. Have your social media people try something, and report back to you the results. Like what you see? Do more. Don't like it? Try another approach. I've found that social media is more about the 'experience' than it is the content, so you're going to have to put some effort into it to get the right combination to work for

you. The good news is that once you find it, there's a HUGE audience to listen to your messaging. Using social media the right way with clear expectations you can make a TON of money. Make sure you add this leverage point to your business arsenal.



## **Leverage Point #8:**

### **Newsletters (Semi - Automated System)**

For over 15 years I've been sending out newsletters via snail mail and for about 5 years digitally. I think when newsletters are done correctly they are without a doubt a cornerstone of your client retention system. Problem is, almost NO ONE does them correctly. You probably get newsletters now, but do you read them? Most people don't read the newsletters they receive, for one simple reason - they suck. Almost every newsletter I receive now contains things about that business, and almost nothing of value to me. Think about it, if I'm paying my accountant to handle my taxes, or my dentist to take care of my teeth, do I care at all about the latest changes to the tax code? Or the newest procedure to remove tartar from teeth? Hell no! That's what I pay them to think about, and be an expert on. Yet, this is the kind of 'stuff' you'll find in almost every newsletter out there, information about their business. This type of newsletter violates a simple, yet often overlooked principle of good direct response marketing.

WIIFM (What's In It For Me?) This is the radio station we are all tuned into. Where's the value to me in reading about the latest tooth procedure! I don't care. There's little to know perceived value to me, their client, and the intended reader. This is why newsletters have a bad rep, the people delivering them don't think about the intended reader their client.

What DOES work like magic? Engages your reader and helps to build strong long lasting relationships with them?; Fun and interesting content that isn't about your business stuff. Things like recipes, fun historical facts, cartoons, jokes, and other tidbits of life types of stuff. Add in some involvement devices to your newsletter (like a giveaway, client recognition, trivia contest, etc.) and you've got yourself a newsletter with a powerful draw for your clients. It will have real and perceived value to them, because it's not all about you! It's about them,

and contains things that are valuable to the average person. Like I said I've been sending a newsletter like this for many, many years, and I can tell you with absolute certainty that doing this will help you retain your customers longer, get them to spend more money, and have them refer lots of business to you.

Even better, these days you can buy content cheaply and easily for your newsletter and then automate the delivery to your clients using Infusionsoft. One of the keys to being successful with newsletters (or really any marketing piece) is consistency. Sending a newsletter one time, and then not again for months is a BIG mistake. You need to send it every month for at least 6 months before your clients will start to recognize, appreciate and respond to it. No matter what you do, send a newsletter, you'll thank me later.

## Leverage Point #9:

### Client Reward System (Automated System)

This one is not only a great strategy, but it can be totally automated by putting a few different systems to work for you. The core strategy is this: Reward your customers for doing business with you. The more they spend with you, the better the rewards. It's been well documented that seemingly random rewards cement your relationship with your clients. These rewards also have the profound effect of increasing your clients 'admiration' and 'affection' of your business. Remember that it's perception and feeling that we're going for not always cold hard fact. If your clients have a positive feeling about your business, they will refer you more often, and patronize your business again and again. Give them a negative feeling and they will do everything in their power to destroy you. That's why the statement "a happy customer tells ONE person and an unhappy one tells TEN" is true.

By simply keeping track of the on-going total spend per client you can then set different reward thresholds. When a clients spending takes them into a given threshold, you send them a gift of some kind. Maybe a gift card, a box of cookies, or something more elaborate, all depending on the amount of money they've spent with you. The beauty of this leverage point is that you get to decide what these rewards are, and how much someone has to spend to reach a given reward, so you can ensure you're always profitable.

As part of my [MAG Platinum program](#), I've created a custom Wordpress plugin that works with Infusionsoft to handle this system turn key. By creating reward levels that include gifts from Send Out Cards, you can totally automate this entire system start to finish, and just reap the rewards of having a system like this. Things like raving fan clients, phone calls thanking you for such thoughtful gifts, and emails galore praising you and your business for being so 'amazing'. All the while, you 'set it' and forgot it, and this system just keeps Wowing your

clients day in and out. Imagine building an army of 'raving fans' (I often call them Advocates) for your business? Think you could charge more and make more money? You know you would. This is a fantastic idea and a killer leverage point that has the potential to transform your business into an extraordinary one.

## Customer Rewards

### Settings:

Total Field:

Trigger Type:

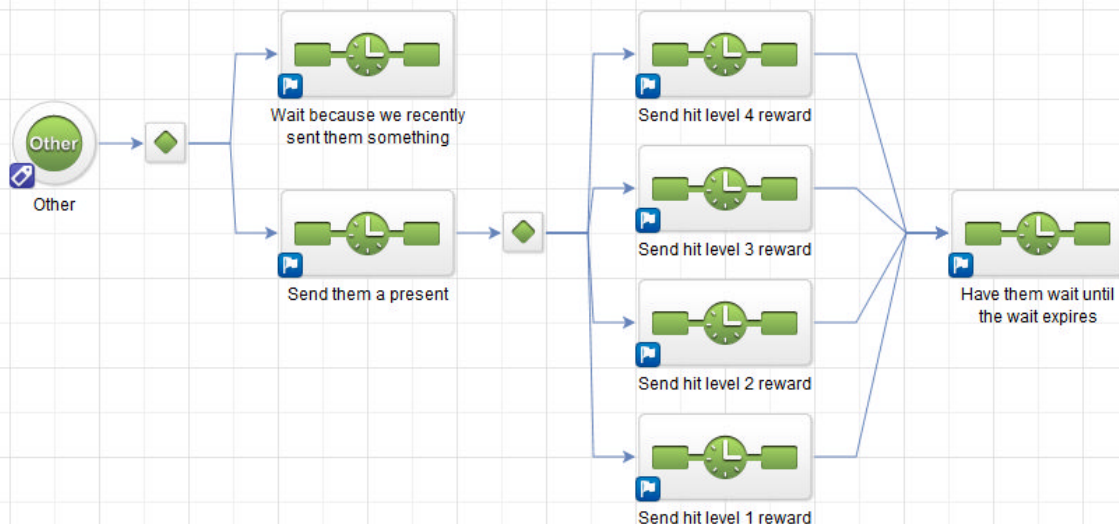
### Triggers:

Range:	<input type="text" value="0"/>	to	<input type="text" value="5000"/>	Apply Tag:	<input type="text" value="Hit Level 1"/>	<input type="button" value="X"/>
Range:	<input type="text" value="5001"/>	to	<input type="text" value="10000"/>	Apply Tag:	<input type="text" value="Hit Level 2"/>	<input type="button" value="X"/>
Range:	<input type="text" value="10001"/>	to	<input type="text" value="15000"/>	Apply Tag:	<input type="text" value="Hit Level 3"/>	<input type="button" value="X"/>
Range:	<input type="text" value="15001"/>	to	<input type="text" value="1000000"/>	Apply Tag:	<input type="text" value="Hit Level 4"/>	<input type="button" value="X"/>

### Infusionsoft URLs:

Update Total:

Apply Trigger:



## **Leverage Point #10:**

### **Birthday Recognition (Automated System)**

This one is a simple system, but carries with it a BIG impact. Recognizing someone's birthday with a card or gift has tremendous impact because so few businesses (or people for that matter) do it. Again you can use Send Out Cards or a similar service to do the fulfillment on this and automate the entire system.

The first step is to gather the person's birthday in some way. What I've found works really well is to tell them that you like to use people's birthday's as a password for your membership site (or customer portal - if you have one) and get it that way. People will forget that you've collected that info and then when you send them a birthday gift, they will think you're amazing.

Once you've collected their birthday, all you need is a follow up sequence that uses that date to trigger an event. The event I use sends an email wishing them a happy birthday and another to Internet Automater, that then gets send out cards to send them a card and some cookies. Nearly every time I send someone a birthday thank you, they contact me with a sincere thanks. It's a very powerful leverage point that you can use and it only takes a few minutes to setup. This is one of the 'set it and forget it' type of campaigns they just can't be beat when it comes to building good will and customer favor.

## Leverage Point #11:

### Client Referral System (Automated System)

Without a doubt, client referrals are key to a business' ability to thrive and maybe even its very survival. This is one of the fundamental ways to build your business, in fact many businesses live almost solely on referrals. They are often the 'best' clients to work with because the trust from one of your previous clients is transferred to the new person, and when the trust is high, the transaction is usually involves a lot less hassle. Yet, in spite of the power of referrals to help business owners thrive, very, very few of them have any type of systematic way to ask for and then deal with referrals. Do you?

I love referrals, and when I took the time to setup an automated process to ask for referrals from my clients, and then market to the referred people, my business exploded, yours will too.

Like most of the things I've laid out in this roadmap setting up a simple system to ask for referrals doesn't take a lot of time, just a little focus and determination. The process is very simple, a series of emails or text messages to your client a short time after they've made a purchase from you is all it takes.

Here are my rules to get maximum referrals in minimum time:

1. Don't send just one. send at least THREE requests for referrals, preferably using different methods, like an email, then a snail mail letter, and maybe a sms message. Or if you're even more creative, you could use a voice broadcast and first thank them for doing business with you and then ask them for a referral, directing them to a webpage to give the referral.
2. Don't be cheap. If you've done your homework and you understand the cost of acquiring a new client, then you know the value of a referral that turns into a customer. I send a

significant reward to EVERYONE that refers someone to me, whether the referred person becomes a client or NOT. People often ask me; "why send reward someone if the referral didn't become a customer?" and my answer is simple. I've asked for a referral, my client took the time to think of one and then gave me the opportunity to sell their friend or family member. It's up to ME to get that person to do business with me, my client did what I asked them to do, and they should be rewarded no matter what. I see too many people 'cheap' out on this and it's costing them thousands if not millions. Reward people that take the action you asked them to, then accept the responsibility of closing the sale yourself. No matter what, your current client that did the referring will feel great about you and your business, and appreciate the reward.

3. Never ask for just one name. If you've got a form for them to fill out, make sure it's got at least 3 empty places on it. People are driven to fill in the blanks, and you'll get a lot more referrals by just having more empty spaces to fill in. If you're rewarding them for each referral with money (like I do) then make sure that next to each referral area there's something that shows them what their reward will be next to it (just to remind them that another name could be worth an additional X dollars).

4. Automate the process. I built a custom 'customer referral' program for my website that collects the referrer's name and their referrals. It then allows the person doing the referring to instantly print a special coupon with the correct dollar amount based on the number of referrals that spends like cash at my business. This way there's an instant payoff to my client that is doing the referring. Once the data is collected it starts the marketing process to the referred people inviting them to come give us a try with a kick butt offer. I also trigger a special thank you gift to be sent to the client that did the referring (Send Out Cards thank you card and cookies).

By taking the time to setup a system that asks for referrals, you can eliminate them falling through the cracks, and at the same time have another opportunity to reward your clients.

If you don't have a systematic way for your clients to send you referrals, and then follow up with them, you're missing out on a TON of cash.



## Leverage Point #12.

### Appointment Scheduling & Follow up (Automated)

First, if you're not operating on an appointment system in some way, and people can just call anytime and you're answering the phone, you are losing valuable time and productivity. I see it all too often where a business owner becomes a slave to their business because they are always answering the phone or their email. Making yourself unavailable is the first step to greater productivity and profits. Many, many business need to operate on some kind of schedule to maximize their efficiency. This is true in both my auto repair business and my coaching group. In both cases I needed a way for my clients to schedule time. What's important here is to realize that these days, allowing our clients to choose what time and day works best for them is easier and more convenient for us both, as long as I have control and can set some parameters of our availability. Think about it, if you can get your clients to head to your website and schedule their appointment without you (or anyone else on your staff) answering the phone and having to take the time to coordinate the calendars isn't that a win for you both? When I realized that it was more profitable for my business to allow my clients to schedule their own appointments 24/7 on my website, I immediately built a system to allow them to do so. Then I 'retrained' them to use that system by making it easier and faster than calling us. Now in my MAG business, nearly 99% of all my appointments are scheduled automatically, and in my auto repair company we're closing in on 20%, a number that I'm working diligently to increase.

There are a number of good web based appointment systems out there. TimeTrade is a popular one as is AppointmentCore, I've personally used Google Calendar and a free program called WebCalendar for many years now to handle various schedules. As my needs grew I had a custom system built that I call [ALES](#) to handle my Webinar schedules and client fulfillment. The beauty of using an automated web based system like this is that it saves time, and you'll get a better show up rate if you include

email and sms reminders for your clients. Use an automated web calendar system and watch your client satisfaction and profits soar!

## **Leverage Point #13.**

### **Sales Process ( Emails, Webinars, Tele-Calls)**

In today's business world, I believe that automating (or at the very least systemizing) your sales funnel process is essential to having a thriving organization. Recent statistics show that it takes up to 8 touches by a business before someone decides to buy. Did you read that? EIGHT touches! Now I don't know about you but I've seen very, very few businesses do more than one. Even if you think you're doing a decent job of following up, it's almost impossible to handle that much follow up without some type of automated system in place. Here's the rub; if you aren't doing this, do you think your competition might? Think about this: if you haven't added automation to your sales process, and your competitor has, you are limited on the number of leads you can successfully follow up with and close, someone using automation is not. They may not be unlimited, but the number of leads they can handle is definitely going to be a multiple of yours. You need a systematic sales process, and while you're at it, adding automation to that process just makes good sense. Heck, I'd bet that if you did nothing more than just add a systematic process to your sales pipeline you'd close a lot more sales. In my mind lots of sales fixes a lot of problems, and lack of sales creates even more. Yet too many times I see entrepreneurs leave this critical part of their business to chance. In my MAG group we spend a lot of time training on crafting a winning sales process and fine tuning existing ones. If you do nothing else from this roadmap, at least do this. Take the time to think about and create a systemized process to sell your prospects that includes at least 8 touches (a touch is a phone call, postcard, email, sms message, face to face visit, etc.). Do this and your sales will improve, guaranteed.

## Leverage Point #14.

### Sms (text) Messages (Automated System)

I'm certain you've heard this before, and I'm sure that some of you reading this are currently using text messaging as at least part of your marketing system. If not, what are you waiting for? Right now using text messaging (SMS for simplicity's sake) still gets nearly 100% open rate, compare that with ever falling email open rates (currently somewhere around 15% for a really good one) and you can start to appreciate the power of this marketing method. Now, there are a few things you need to be careful of, new legislation does place some restrictions on marketing messages by sms, you can send appointment reminders and such, but NOT sales messages without specific written permission - so you've been warned. Also be aware that Federal law restricts sending of mobile text or voice messages between 9PM and 8AM of recipient's local time, so make SURE your system takes into account people's local time zone.

Here's an excerpt right from the fcc.gov website:

*The FCC's ban does not cover "transactional or relationship" messages -- that is, notices to facilitate a transaction you have already agreed to -- for example, messages that provide information about your existing account or warranty information about a product you've purchased.*

If you're like me, you can build your landing/squeeze pages and opt in forms and pages to automatically collect people's local time zone. Here's a quick list of the ways you can safely use sms messages to increase response to your marketing and offers:

1. Reminders for appointments.
2. Reminders for webinars (include their custom link in the sms for a 10-20% increase in show up)
3. Feedback survey (when someone does business with you, send them a short text message asking for their feedback, you can even do a short survey via text with their responses being from 0-5 for a few questions)

4. Invite to events - Just be careful that you're not trying to sell anything from the text message.
5. Product Information - let them know additional information about the product or service they purchased from you.
6. Happy birthday wishes. I've been sending my clients a happy birthday wish for years now.
7. Engagement reminders. Let people know that they haven't been around in a while and they are missing out. This works extremely well for on-going monthly programs and can be automated.
8. Special discounts or offers - Let people know about a special you're running, just be sure you can show a previous business relationship.

I've thoroughly tested sending sms reminders to remind people of events, and consistently I've seen a 10% to 20% increase in show up rates. So if you've not yet taken the time to setup sms messaging as part of your marketing arsenal, it's time to get on board.

Whatever you do, don't let the fear of getting in trouble prevent you from using text messaging in all of your business and marketing efforts.

## Leverage Point #15.

### Voice Broadcast (Semi To Fully Automated)

For some, voice broadcast is old hat. For others this might be the first time you've heard of it. Essentially, it's a pre-recorded message (usually done by you) sent to your customer base. Here again I say customer base because it's illegal to send voice blast messages to a list of phone numbers that you have no relationship to, but usually ok to your customers. (again check with your lawyer - don't just take my word for it) That being said, I've used voice broadcast for a long, long time now and it's extremely effective. Very little you can do, can have such a dramatic impact so quickly as voice broadcast can. I've literally pushed send and before I could move the phone rang with someone responding to my message. Let me be tell the truth, when I first heard about voice broadcast, it scared the crap out of me. I thought my clients would freak out and string me up for sending them a message, but with some encouragement from other marketers, I found the courage to give it a try. I'm sure glad I did, within minutes of sending my voice blast, my business went from being slow and devoid of customers to jam packed with business. BUT here's the rub: you WILL have a few people call and yell at you because you used this method to contact them. Accept it, tell them you're sorry and get over it. The opportunity to make money and promote your various offerings is just too big to ignore.

I've found after more than 10 years of using this marketing method, the pluses simply overwhelm the negatives, as long as you don't abuse this. One call a month is acceptable to most people, and that would be a lot in my opinion. Again, don't be stupid here, don't send a voice blast at the wrong time, make sure it's after 10:00am and before 4:00pm. You don't want to disturb people's normal routines, this is where you'll get the most friction if you do. Be respectful of your clients time and you can use this strategy to make a ton of cash. My good friend and fellow marketer Jermaine Griggs uses voice broadcast in his

business and in a very creative way to thank his customers for doing business with him. If you open your mind, you can use this technique to grow your business and loyalty too. Trust me, it's still one of the least expensive, yet most effective ways to reach out to your customer base.

## Leverage Point #16.

### New Mover Campaign ( Automated)

I love this leverage point because of its amazing effectiveness and ability to be totally automated. Anytime you can get a marketing campaign making you money, and then completely automate the process, you're going to benefit big time. If you have a brick and mortar business like I do, then you should know that people are always moving in and out of the area around you, and this makes them great targets to invite to try you out. If you've never done some analysis of your current customer base, then I'd advise you to immediately do so. These days it's simple, as long as you have your current clients addresses, you can upload a .csv file into a Google doc spreadsheet and then use <http://mapalist.com>. This is a free web resource that puts a virtual 'push pin' on a map of where your current customers live. Why do this? Because you'll quickly find out that an overwhelming number of your current clients live near your place of business. Sometimes even on the same street. So you can target your marketing to others that move into that same area. There's a reason your current customers choose you, and it's likely that others will as well. Make them an offer to give you a try and you can build your business quickly. There's other highly valuable information from this analysis too, but that's beyond the scope of this roadmap.

Once you have your perfect target area, you can call up a company like New Pros (<http://www.newpros.com>) and buy a list (Cheap) of people moving into your target area. You can't sort by household income, but you can sort by zip code, and purchase price of the home they are moving into, so you can get even closer to your ideal target.

Now this is where the automation fun begins. New pros will either send you a cd every month of the new people moving into your target, OR send you an email with the list attached. I had a custom program written that watches a special email account that only Newpros uses for an email from them with a .csv file attached. Once the program finds that, it imports the attached .csv listings into my Infusionsoft application, and starts a



campaign on them that repeatedly makes them an offer to give us a try and sends my fulfillment house the sequence steps to fulfill. Neither myself nor anyone on my staff has to lift a finger to make this campaign run month in and month out. All the steps start to finish are automatic. With some additional tricks I was able to add automatic tracking to this campaign as well, so I know EXACTLY what my ROI is from this campaign. Pretty cool, eh? You don't have to be a rocket scientist to see that adding a system like this to your business will skyrocket your income. I've been using this system for years and years now, and it's made me more money than just about anything else I do.

## Leverage Point #17.

### Multi-Step Mailing Sequences (Automated)

This particular leverage point is more of a marketing lesson than a point of leverage in and of itself. We talked about this before in a previous leverage point, but here I'm going to be a bit more specific. The marketing principle is that it takes up to EIGHT contacts to get a person to respond to a particular offer, yet most people stop after one or maybe two, that's where having a multi-step sequence can really make a huge difference. In addition to the boost you'll get from adding multiple steps to any campaign, there's another distinct advantage to having multiple steps, what I like to call the 'fun' factor. When you're doing smart marketing and adding multiple steps to your campaigns, you can then have a little fun with your prospects, saying things like ' I've sent you two letters already, what do I need to do to get your attention?' or 'Ok, this is the third time I've reached out to you...'

Since almost no one does this type of multi-step campaign, you immediately stand out in the prospects mind as being different and unique. I've even had people call me and laugh out loud when they get my third letter in a series saying things like ' Hey, give me a break, I was out of town..' or ' I'm sorry I didn't respond yet, I've been really busy ' Really! I've had more than a few people apologize to ME for not taking me up on my offer. That's powerful marketing. Any time you can do something different than your competition, you're going to set yourself apart in your clients mind, and that means you can charge higher prices and realize increased profits.

When you can use a tool like Infusionsoft to trigger and manage a campaign like this, there's virtually no limit to the creativity or number of steps you can take to get a prospects attention. Just make sure you're marketing to the right target audience, and you'll end up fine.

I've helped hundreds of small businesses thrive using multi-step campaigns and rake in millions in sales from letters

I've written. Believe me, when you want to market your products and services, sending a 'one of' type mailing is a waste of your time. In my opinion, you might as well burn the money. Test after test shows it takes a well crafted marketing piece containing the correct direct response elements, AND a sequence of marketing messages to get maximum results.

So 'how many' steps should you send? 'It depends' is the only answer I can give, but as a general rule of thumb, I like to have a minimum of three. What's the variable here is the law of diminishing returns. Each time you reach out to a prospect, it typically costs you money (unless you think that just pounding people with email is effective marketing). So you'll need to know what a new customer is worth to you to calculate what you can afford to spend to acquire one.

As a final note on this make sure that each step in your marketing campaign hits on a different emotional trigger, physiological trigger or fear that people have. Some of the most common ones are: Testimonial and offer Gain, Chart or graph and offer Logic, Take away (fear of loss, don't miss out).