

# Marketing Automation Plan

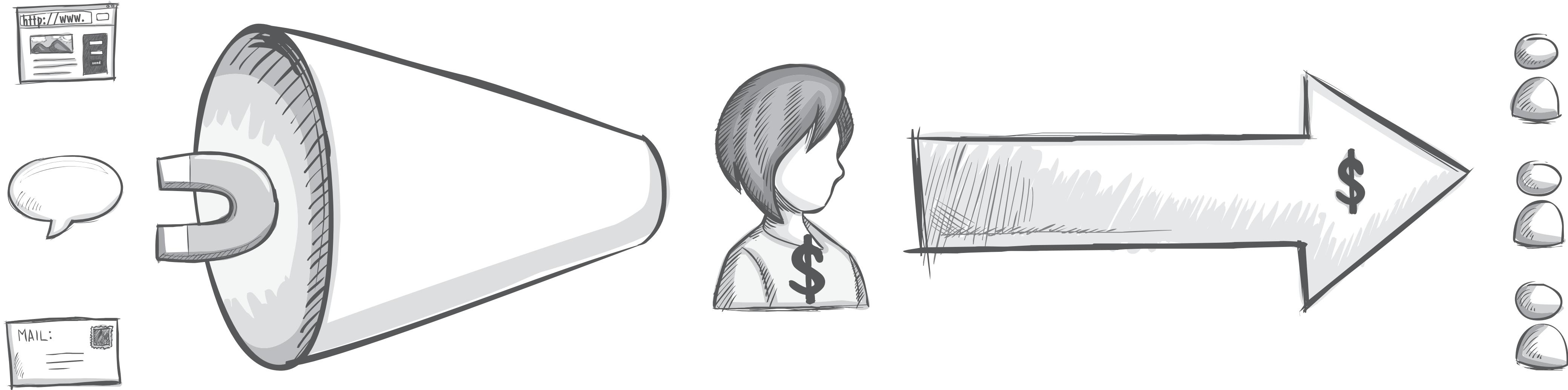
## Creation Guide

# Steps To Creating Your M.A.P.

- Identify your business MODEL
- Identify the CHARACTERISTICS of your business
- Identify which CAMPAIGN STRATEGIES should be used for your business model with your characteristics
- Plan out the PERFECT CUSTOMER LIFECYCLE by removing all limitations and focusing on the ideal customer experience as if you could dedicate all your time & resources on ONE CUSTOMER
- PLAN it out on paper with the attached Perfect Customer Lifecycle sheet or in your Keap/ Infusionsoft account using the Campaign Builder
- Make an EXECUTION PLAN by identifying the distinct pieces of your customer lifecycle and building them out step-by-step



# The Perfect Customer Lifecycle



Attract Traffic	Capture Leads	Nurture Prospects	Convert Sales	Deliver & Satisfy	Upsell Customers	Get Referrals
Attract leads to your site with great content like webinars, reports, case studies and blog posts.	Encourage leads to sign up to receive your content. Be sure to include opt-in language in your Web form.	Create a consistent, valuable nurture campaign with automated, personalized follow-up messages.	Turn browsers into buyers with e-commerce tools and an effective lead management strategy.	Deliver on what was promised. Then go above and beyond to really wow your customers.	Develop a long-term upsell strategy to help grow recurring revenue over time.	Encourage referrals with a great customer and partner referral program.
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# Business Model & Characteristics

	Product	Service	911	Low Price	Med Price	High Price
Local Services		X	X	X	X	X
Online Services	X	X		X	X	X
E-Comm	X			X	X	
Influenc.	X	X		X	X	X

Use the following charts to know which types of campaign strategies to use in your business model. **White X's** represent campaign strategies that will almost always be used. **Orange X's** represent campaign strategies that will sometimes be used (depending on the business) or aren't as important.



# Attract Traffic

	PPC	SEO	Outdoor r/Radio	TV	Foot Traffic	Social	Events
Local Services	X	X	X	X	X	X	X
Online Services	X	X		X		X	X
E-Comm	X	X				X	
Influenc.	X					X	X



**BOX OUT**

# Capture Leads

	911 Offer	E-Book/ Guide	Video Series	Webinar	Coupon	Quiz/ Assessm.
Local Services	X	X	X	X		X
Online Services		X	X	X		X
E-Comm		X	X		X	
Influenc.		X	X	X		X



**BOX OUT**

# Offer/Conversion/Sales

	Tripwire	Webinar Offer	Video Launch	In-Person Seminar	Phone Sales	In-Person Sales
Local Services	X	X		X	X	X
Online Services	X	X	X	X	X	X
E-Comm	X		X			
Influenc.	X	X	X	X	X	X



**BOX OUT**



# Post-Sale Engagement

	One-Click Upsell	Post-Sale Upsell	Referral Request	Testimonial Request	Online Review Request	Repeat Sales
Local Services		X	X	X	X	X
Online Services		X	X	X	X	X
E-Comm	X	X	X	X	X	X
Influenc.	X	X	X	X	X	X

# Low Price Offers

- Direct Offers, Guarantees, Stack Value (reduce buying friction)
- Coupons
- Bonuses
- Money-Back Guarantees
- BOGO (Buy-one, get-one free)
- Use urgency & scarcity



# Medium Price Offers

- A relationship of trust **MUST** be in place **BEFORE** the purchase happens
- Trust can be developed via:
  - Purchase of a low-priced product
  - Educational nurture process (emails, videos, etc)
  - Endorsement
  - Events (live events, webinars, etc)



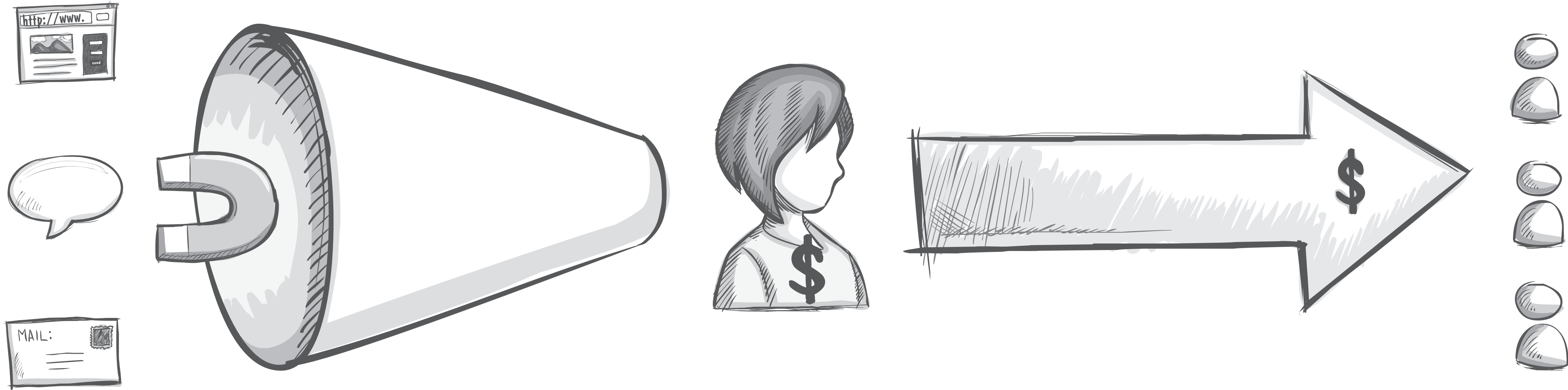
# High Price Offers

- A PERSONAL relationship of trust MUST be in place BEFORE the purchase happens
- That personal relationship will required a conversation over the PHONE or IN-PERSON
- Setting up a sales process and sales pipeline technology will help sales operations & communications immensely

Go create YOUR **M.A.P.!**



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