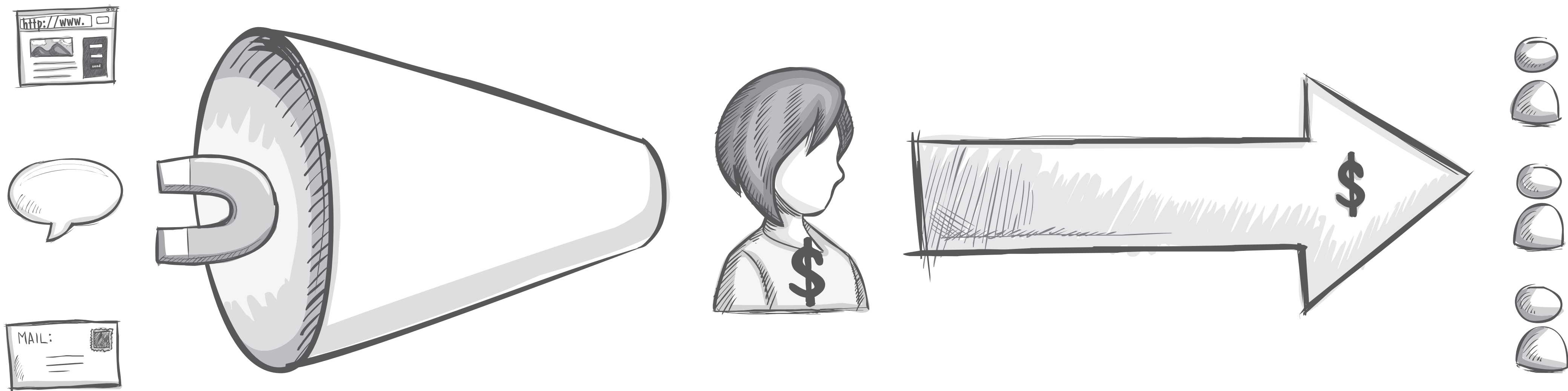# Sample **M.A.P.S**

(Marketing Automation Plans)

BOX OUT

The Perfect Customer Lifecycle
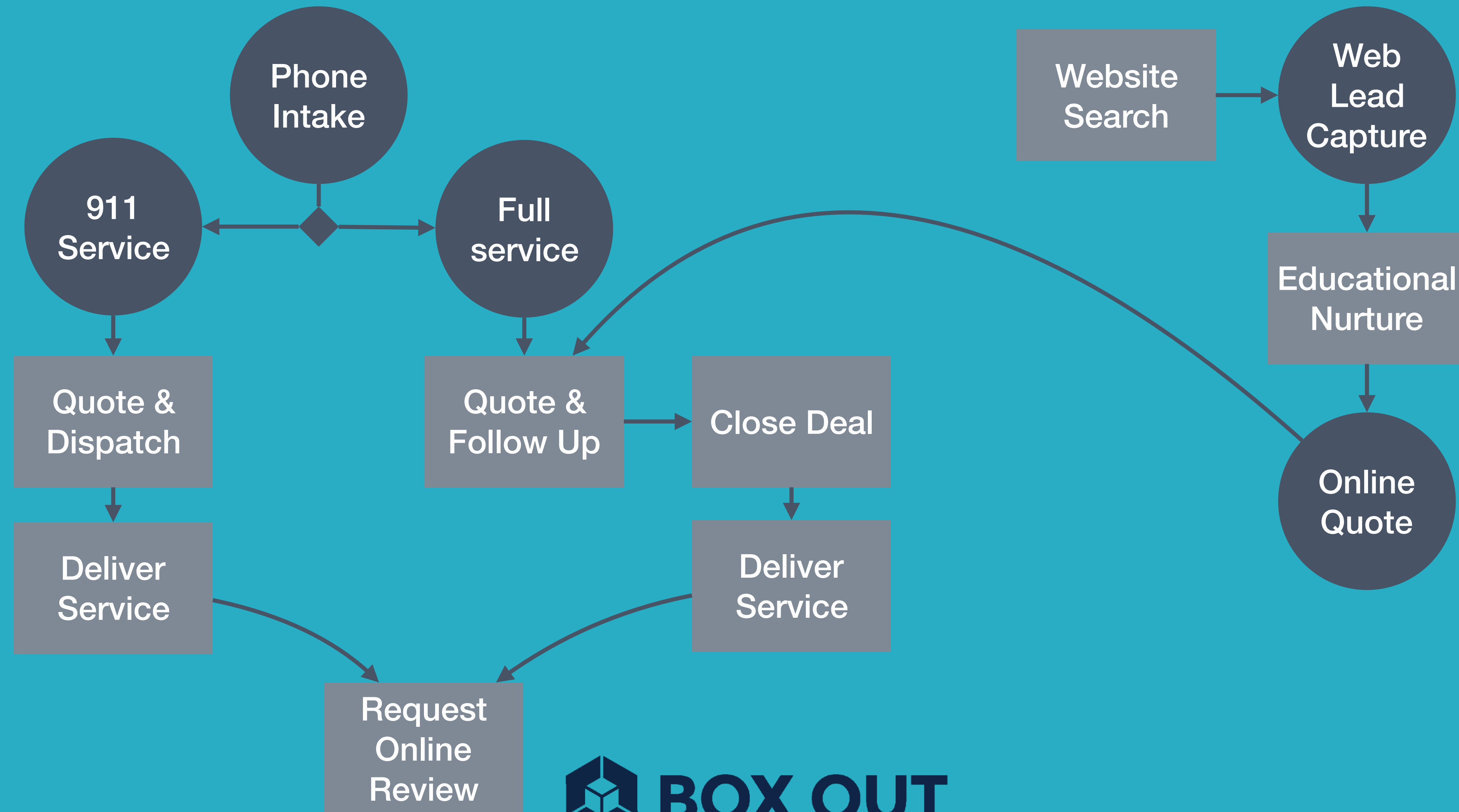
Attract Traffic	Capture Leads	Nurture Prospects	Convert Sales	Deliver & Satisfy	Upsell Customers	Get Referrals
Attract leads to your site with great content like webinars, reports, case studies and blog posts.	Encourage leads to sign up to receive your content. Be sure to include opt-in language in your 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.

	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

BOX OUT

Example: Local Service (Plumbing)

Example: Local Service (Plumbing)

Phone Intake

Web Lead Capture → Educational Nurture → Quote → Follow Up → Close Deal → Deliver Service → Request Online Review

Video Series

Guide

Indoctrination

Sales Pipeline

Loyalty Rewards Program

BOX OUT
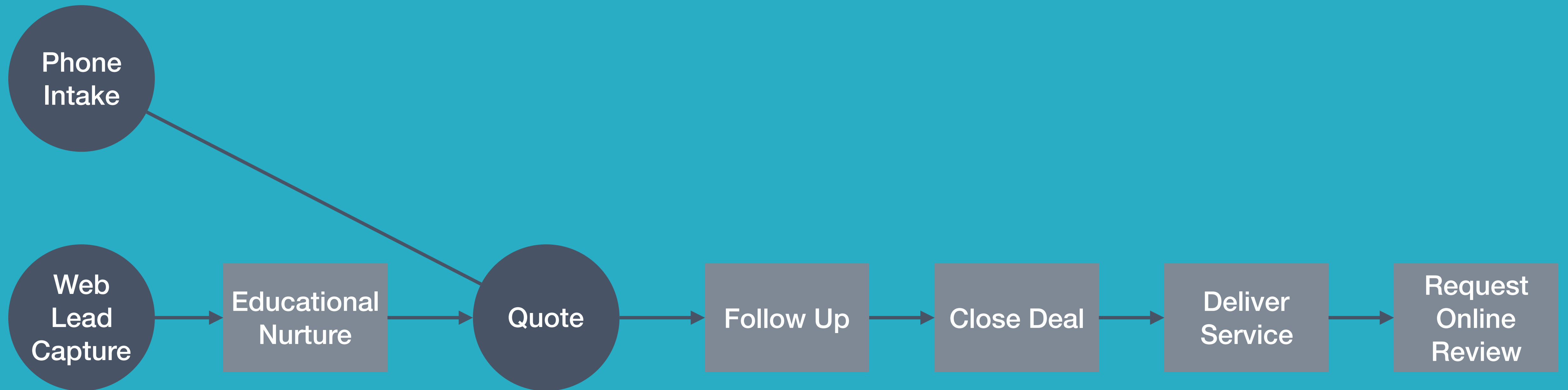
Example: Local Service (Med Spa)

Phone or Office Intake

Radio Ad → **Educational Seminar** → **Quote** → **Follow Up** → **Close Deal** → **Deliver Service** → **Request Online Review**

Seminar

Indoctrination

Sales Pipeline

Loyalty Rewards Program

BOX OUT
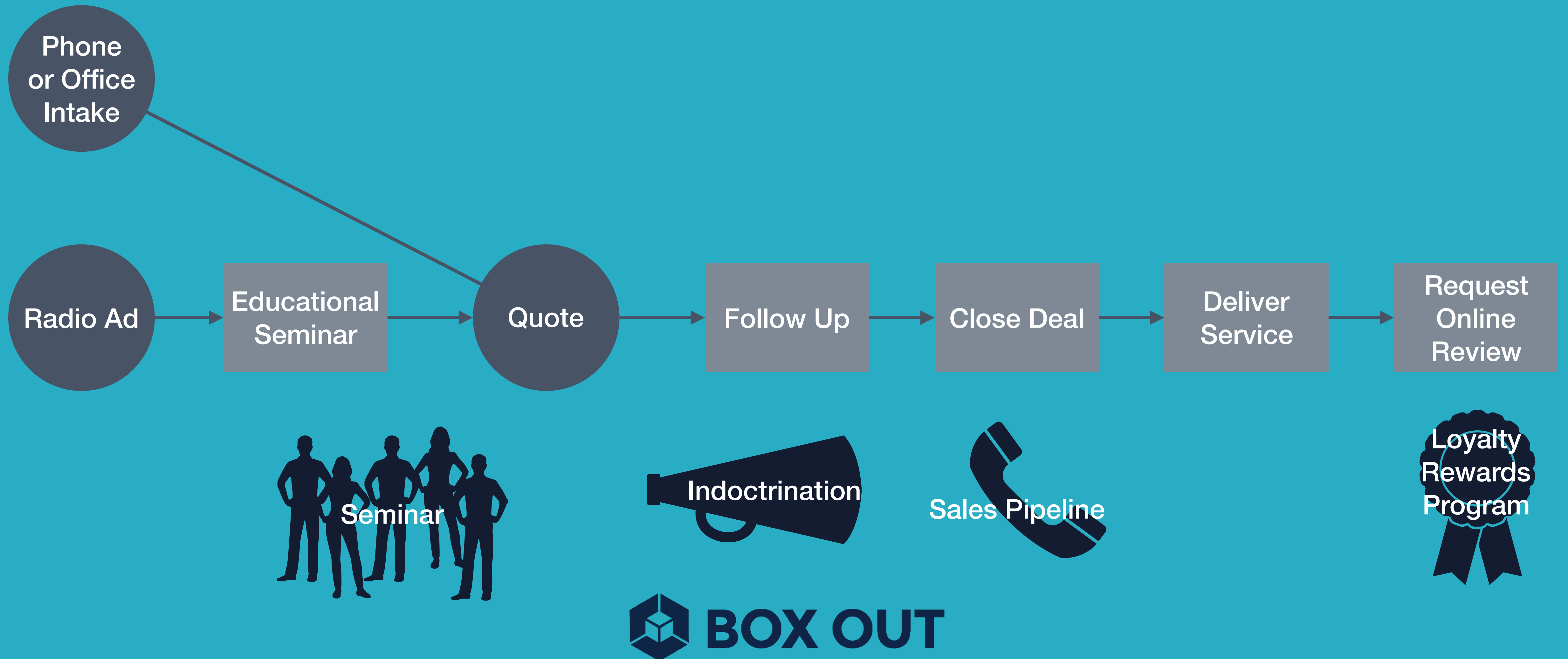
Example: Influencer

Example: E-Commerce

Offer

Lead Magnet → Nurture → Purchase → Purchase → Fulfillment → Request Online Review → Repeat Purchase

Coupon

Indoctrination

Offers

Loyalty Rewards Program

BOX OUT
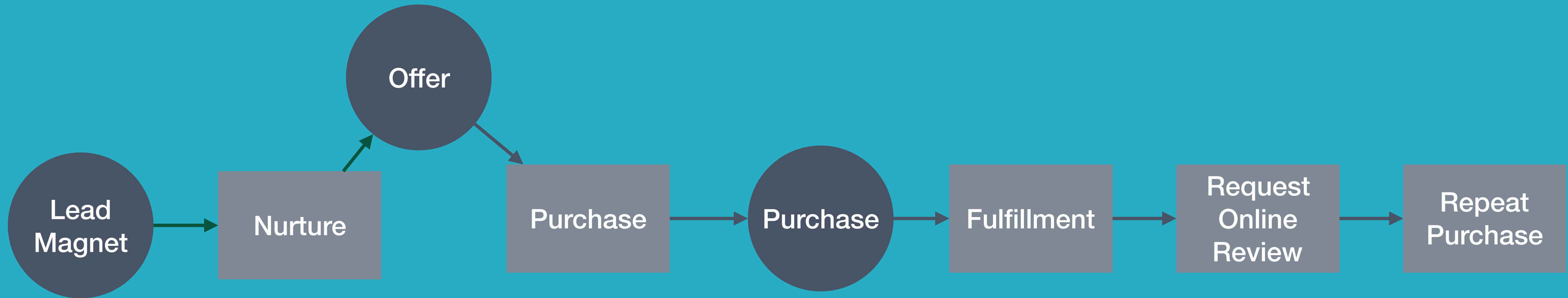
Low Price

- Direct Offers, Guarantees, Stack Value (reduce buying friction)

- Coupons

- Bonuses

- Money-Back Guarantees

- BOGO (Buy-one, get-one free)

- Use urgency & scarcity

BOX OUT

Medium Price

- 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

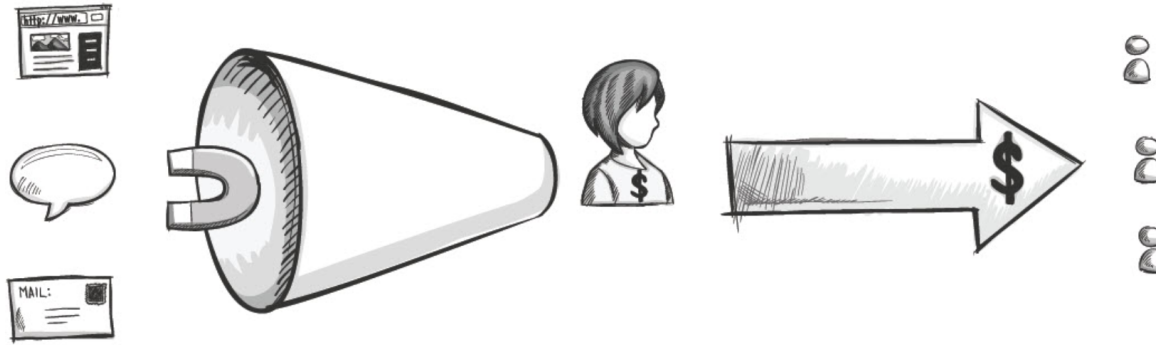 - Events (live events, webinars, etc)

BOX OUT

High Price

- 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

BOX OUT

The Perfect Customer Lifecycle™

Built Exclusively for All About Spelling

	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	Sources: ? Traffic: ?/mo	Magnet: ? Webform: ? Opt-Ins: ?/mo Conv Rt: ?%	Hand Raise: ?	Selling Model: ?	Cart: ? Upsell: ? Credit Card: ? Pmt Plans: ?	Acct Mgr: ? Ship Prod: ? Follow Up: ?	Prod Name: ? Timing: ?	Testimonial: ? Referral: ?
Goals & Opportunities	(Visitors) +	(Opt-Ins) +	(Qualified Leads) +	(Agreement To Buy) +	(The Cash) +	(Satisfied Customer) +	(Repeat Customer) +	(Testimonials & Referrals) +

Marketing Automation Plan (M.A.P.)

PPC & SEO

20 Best Tips for Teaching Spelling
tag: Free Report

Home School → Home School Teacher Follow-up

Classroom → Classroom Teacher Follow-up

Shopping Cart
Sell Level 1

In-cart Upsell
"Cobweb the Cat"

New Customer Sequence
Upsell to Level 2 after 60 days

Shopping Cart
Sell Level 2

Level 2 Customer Sequence
Upsell to Level 3 after 60 days

Shopping Cart
Sell Level 3

Level 3 Customer Sequence
Upsell to Level 4 after 60 days
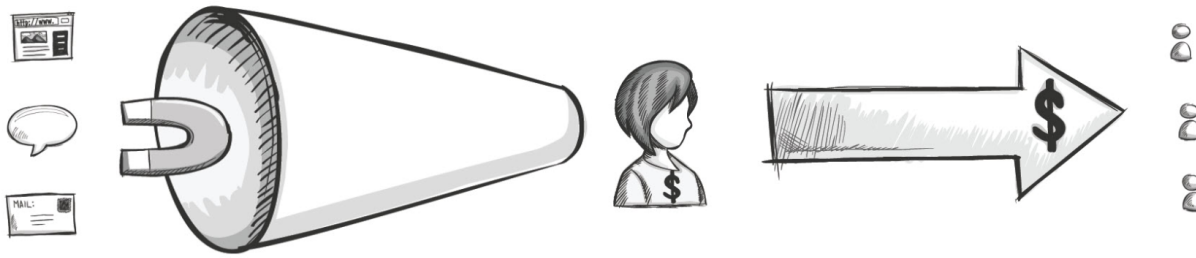
Additional Support Resources:
Infusionsoft Online Support Center

Support: 1.866.800.0004 x2

How to set up:
Task
Note Template
Letter Template
Discounts, Trial, and Upsell Promotions

The Perfect Customer Lifecycle™
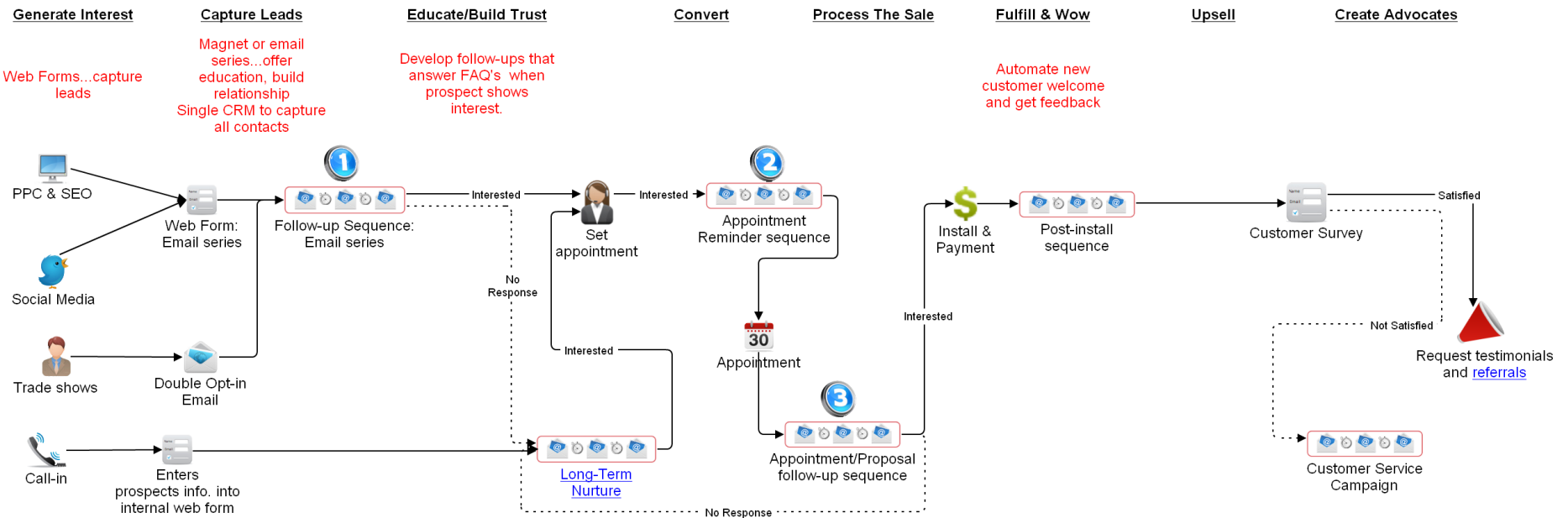
Built Exclusively for ...

Goals & Opportunities

Marketing Automation Plan (M.A.P.)

Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates

Web Forms...capture leads

Magnet or email series...offer education, build relationship
Single CRM to capture all contacts

Develop follow-ups that answer FAQ's when prospect shows interest.

Automate new customer welcome and get feedback

PPC & SEO

Social Media

Trade shows

Call-in

Web Form: Email series

Double Opt-in Email

Enters prospects info. into internal web form

① Follow-up Sequence: Email series

Interested

No Response

Interested

Long-Term Nurture

Set appointment

Interested

② Appointment Reminder sequence

30 Appointment

③ Appointment/Proposal follow-up sequence

No Response

Interested

Install & Payment

Post-install sequence

Customer Survey

Satisfied

Not Satisfied

Request testimonials and referrals

Customer Service Campaign

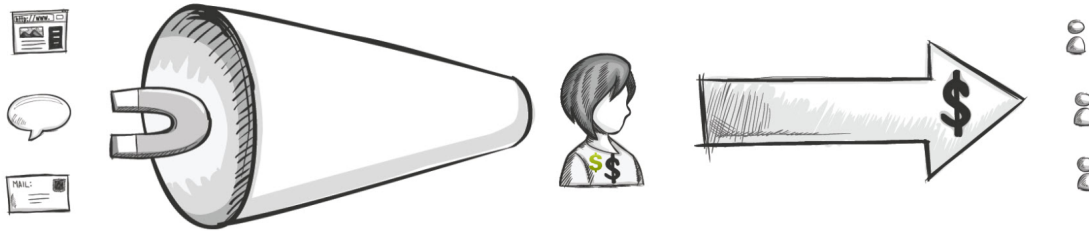**Additional Support Resources:**
Infusionsoft Fundamentals Webinars
Infusionsoft Online Support Center

Support: 1.866.800.0004 x2

How to set up:
Task
Note Template
Letter Template
Discounts, Trial, and Upsell Promotions

The Perfect Customer Lifecycle™
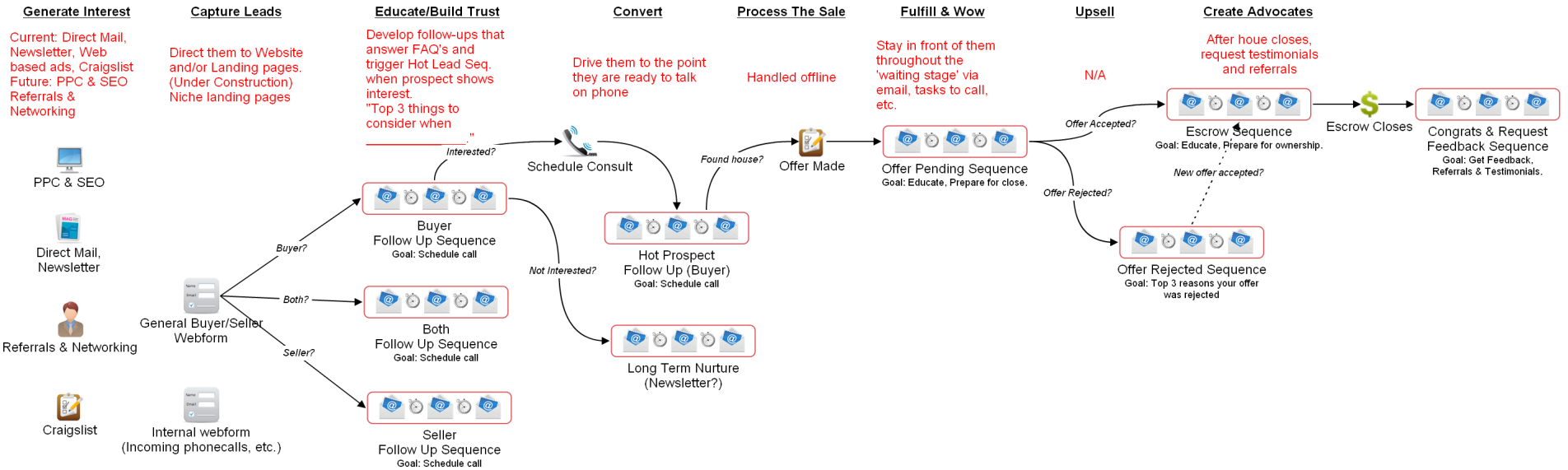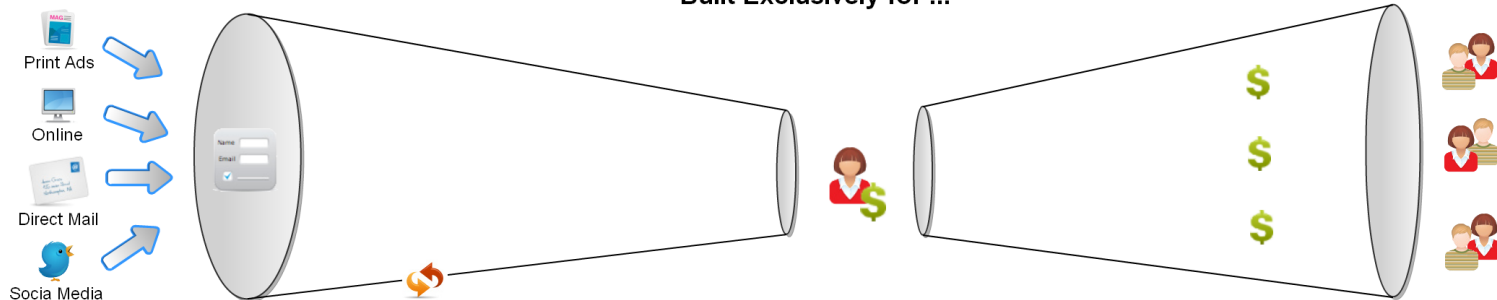
Built Exclusively for ...

Goals & Opportunities

Marketing Automation Plan (M.A.P.)

Generate Interest

Current: Direct Mail, Newsletter, Web based ads, Craigslist
Future: PPC & SEO Referrals & Networking

PPC & SEO

Direct Mail, Newsletter

Referrals & Networking

Craigslist

Capture Leads

Direct them to Website and/or Landing pages. (Under Construction) Niche landing pages

General Buyer/Seller Webform

Internal webform (Incoming phonecalls, etc.)

Educate/Build Trust

Develop follow-ups that answer FAQ's and trigger Hot Lead Seq. when prospect shows interest.
"Top 3 things to consider when _____."

Interested?

Buyer Follow Up Sequence
Goal: Schedule call

Buyer?

Both Follow Up Sequence
Goal: Schedule call

Both?

Seller Follow Up Sequence
Goal: Schedule call

Seller?

Schedule Consult

Convert

Drive them to the point they are ready to talk on phone

Hot Prospect Follow Up (Buyer)
Goal: Schedule call

Not Interested?

Long Term Nurture (Newsletter?)

Found house?

Process The Sale

Handled offline

Offer Made

Fulfill & Wow

Stay in front of them throughout the 'waiting stage' via email, tasks to call, etc.

Offer Pending Sequence
Goal: Educate, Prepare for close.

Offer Accepted?

Offer Rejected?

Offer Rejected Sequence
Goal: Top 3 reasons your offer was rejected

Upsell

N/A

New offer accepted?

Create Advocates

After house closes, request testimonials and referrals

Escrow Sequence
Goal: Educate, Prepare for ownership.

Escrow Closes

Congrats & Request Feedback Sequence
Goal: Get Feedback, Referrals & Testimonials.

Additional Support Resources:
Infusionsoft Fundamentals Webinars
Infusionsoft Online Support Center

Support: 1.866.800.0004 x2

How to set up:
Task
Note Template
Letter Template
Discounts, Trial, and Upsell Promotions

The Perfect Customer Lifecycle™

Built Exclusively for ...

Print Ads
Online
Direct Mail
Socia Media

	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	Sources: ? Traffic: 300/day	Magnet: Online Estimator Webform: ? Opt-Ins: ?/mo Conv Rt: 40% of business off website	Hand Raise: Currently doing nothing	Selling Model: Try to call all leads	Custom Cart in use	Product shipped, no post sale follow up	Prod Name: ? Timing: ?	Testimonial: ? Referral: ?
Goals & Opportunities	(Visitors) Web Forms...capture leads	(Opt-Ins) Magnet : Price Calculator, DIY 7 part guide?	(Qualified Leads) Develop follow-ups that answer FAQ's and trigger Hot Lead Seq. when prospect shows interest. (Optimize agents time)	(Agreement To Buy) Nurture them until they are ready to go online and order off the site	(The Cash) API into Infusionsoft	(Satisfied Customer) Fulfillment occurs how it already does, use Infusionsoft to urge them to go from Tile samples to full tile order	(Repeat Customer) Upsell on Full tile order (from tile sample purchase)	(Testimonials & Referrals) Automatically request a quote from those who are satisfied.

Marketing Automation Plan (M.A.P.)

PPC & SEO

7 traps to avoid...
Website Lead

New Lead Follow Up

Interested? → Hot Prospect Sequence

No Response

No Response

Long-Term Nurture

Interested?

Interested?

Shopping Cart

New Customer Follow Up

Satisfied?

Not Satisfied

Customer Service Campaign

Request testimonials and referrals

Upsell - request a quote seq.

Additional Support Resources:
Infusionsoft Online Support Center
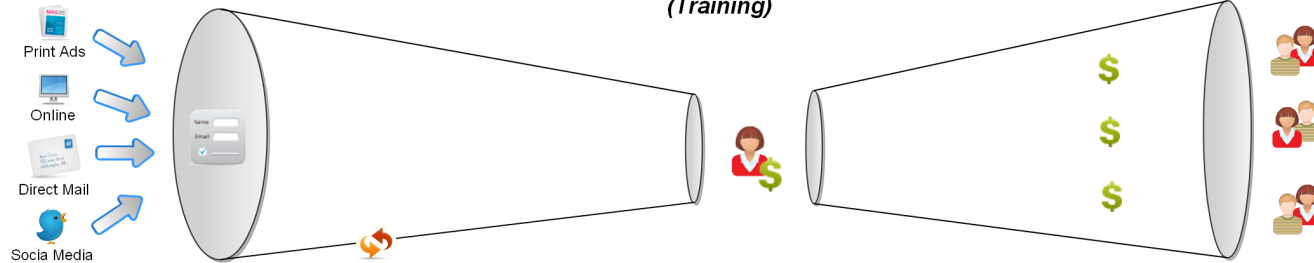
Support: 1.866.800.0004 x2

How to set up:
Task
Note Template
Letter Template
Discounts, Trial, and Upsell Promotions

The Perfect Customer Lifecycle™

Built Exclusively for ...
(Training)

	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	**Sources**: Newsletter (~300); Word of Mouth, Twitter, Facebook, Website, Blog **Traffic**: ~200/mo	**Magnet**: Free Article - 13 skills employers demand in the workplace **Webform**: Hidden **Opt-Ins**: ~0/mo **Conv Rt**: 0	**Hand Raise**: N	**Selling Model**: no reps purchase online	**Cart**: Not yet **Upsell**: N **Credit Card**: Not yet (does have PayPal) **Pmt Plans**: No may do subscriptions	**Acct Mgr**: N **Ship Prod**: N (digital) **Follow Up**: N	**Prod Name**: N **Timing**: N	**Testimonial**: Have a few **Referral**: N
Goals & Opportunities	(Visitors) -Speaking, Joint Ventures, Colleges and Corporations, Affiliate programs. -Submit articles for college, young professionals publications	(Opt-Ins) -Turn free report into a magnet. Offer via webform. -Opt-in form above the fold on home page (every page, recommended)	(Qualified Leads) Break free report into an email series. Use this to establish your expertise, deliver value, build trust.	(Agreement To Buy) Drive to the webinar	(The Cash) -Enable webinar registration/payment. (May do bootcamps in future.)	(Satisfied Customer) Automate new customer welcome	(Repeat Customer) Future: develop product progression to move from one to the next.	(Testimonials & Referrals) Corporation & college partnerships

Marketing Automation Plan (M.A.P.)

Drive to website by making a special offer or free download.

Business Cards (from Event) → Internal Webform — tag: event source

Joint Ventures · PPC & SEO · Newspaper & Magazine Articles · Live Events · Social Media

3 Part Video Series — tag: Video Series

3 Part Video Series Email Series

"Trading in ..." free webinar — Ready to buy/hire → Shopping Cart

No response → Long-Term Nurture

Drive to Webinar Reminder

New Customer Follow Up (Product Purchases) — Add to Newsletter

(If satisfied) Upsell / New Products

(If not satisfied) Customer Service Campaign

Request testimonials and referrals

How to set up:
Task
Note Template
Letter Template
Discounts, Trial, and Upsell Promotions

The Perfect Customer Lifecycle ™

Built Exclusively for ...
(Healthcare Technology)

Print Ads
Direct Mail
Online
Socia Media

$ $ $

	Generate Interest	Capture Leads	Educate/Build Trust	Convert The Lead	Fulfill & Wow	Upsell	Create Advocates
	(Visitors)	(Opt-Ins)	(Qualified Leads)	(Sales)	(Satisfied Customer)	(Repeat Customer)	(Testimonial/Referral)
Current State	Sources: 1. Lecture Circuit;2. Webinars 3. Blog; 4. Website; Social Media; Traffic: 5k/mo from site; 1300/mo	Magnet: Whitepaper Webform: YES Opt-Ins: 200/mo; Lectures/Webinars 1k-1.5k Conv Rt: N/A%	Hand Raise: Face to Face whitepaper foot in the door	Selling Model: Assign to rep Cart: Yes, but not now Upsell: YES Credit Card: YES Pmt Plans: NO	Acct Mgr: YES Ship Prod: YES Follow Up: YES/support/surveys	Prod Name: Many products and services Timing: post sale *planned*	Testimonial: Think about leveraging Referral: Affiliate Program
Goals/Opportunities	expand to include social media opt in	increase opt ins from online presence and track conversion ratios	automate education for tire kickers and prompt followup subsequent	learn about opp. mgmt and the working of leads through a sales pipeline *entered into CRM; marketing person schedules; Dr. talks to clients personally; readys contracted; office mgr followup 7&30days*	put together some products for immed purchase	automate upsell with cust sat surveys and offers	create an affiliate program to increase leads and revenue

Focus List
* 1 Campaign Configuration
* 2 Campaign Configuration
* 3 Flex Block: Training
* 4 Flex Block: Training

Marketing Automation Plan (M.A.P.)

Lecture Circuit

Webinars

Blog/Website

S1B: Existing Data
Training Tutorial

Outbound Prospecting

List

Internal Webform:
Training Tutorial

Webform:

New Lead: Hot
click here

New Lead: Educate
Follow-Up

Assign

Assign

Option 1
Option 2
Option 3

Opp. Mgmt
Training Tutorial

New
Working
Won
Triggers

Unable to Contact
LVM
On Hold

Non-conversion

Option 1
Option 2
Option 3

Convert

Convert

Non-conversion

Long-Term Nurture:
Training Tutorial

Shopping Cart:
Training Tutorial

Ship Product

New Customer Follow Up

Happy

Not

Discounts on Bundles
Training Tutorial

Testimonial/ Referral

Customer Service

Additional Opportunities

Social Media:
Training Tutorial

Affiliate Program
click here

Affiliate Center
click here

Affiliate Messaging

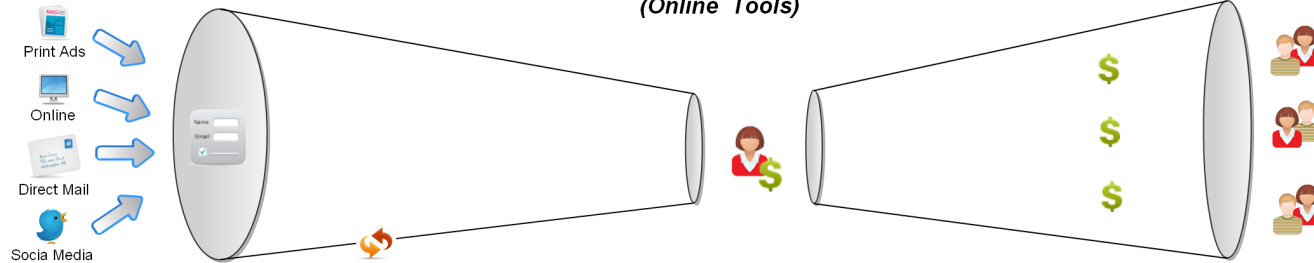Become an Infusionsoft Affiliate!!
Training Tutorial
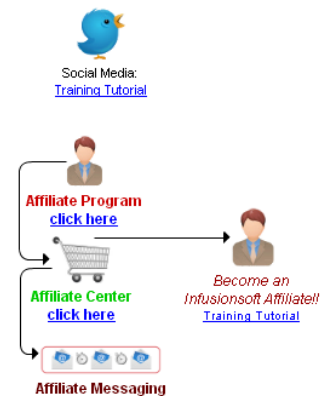
The Perfect Customer Lifecycle ™

Built Exclusively for ...
(Information Marketing)

Print Ads
Online
Direct Mail
Socia Media

Name
Email

$ $ $

	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	**Sources**: Social Media, **Traffic**: 1600/mo	**Magnet**: ? **Webform**: Opt-in form **Opt-Ins**: ?/mo **Conv Rt**: ?%	**Hand Raise**: Website, with free content (Free, hi-def videos)	**Selling Model**: Online, some direct selling via conferences and events, mostly 1-to-few	**Cart**: pay-pal **Upsell**: ? **Credit Card**: na **Pmt Plans**: na	**Ship Prod**: DVD's, course kit. **Follow Up**: No follow up strategy	**Prod Name**: NA	**Testimonial**: request via emails, and utilize FB, twitter, In.
Goals & Opportunities	(Visitors)	(Opt-Ins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
	Twitter, Facebook, In, Optimized for SEO,	Magnet: Videos, info Infusionsoft Opt-In	Educate & Build Trust (New Lead Campaign)	Drive them to purchase page	?	?	?	Need Testimonial/Referral Acquisition Campaign

Marketing Automation Plan (M.A.P.)

PPC & SEO
Social Media

Reinvented Opt In
Web Forms

New Lead Follow Up
Follow Up Sequences

Interested?

Hot Lead Campaign
Follow Up Sequences

No Response
Actions

Shopping Cart
Learning how you can sell online

New Member Follow Up
Follow Up Sequences

Upsell Campaign, Cross Sell campaign (Product Specific)
Follow Up Sequences
Buy Now Links

Capture Testimonial/Referral campaign
Follow Up Sequences

Note that there are multiple ways to sell online: Based on watching the above video, you will want to go here: **Training Videos** and watch the eCommerce videos relating to the method you wish to utilize.

Long-Term Nurture
Follow Up Sequences

WP Membership Site (Either **InfusionWP** or **DAP**)

The Perfect Customer Lifecycle™

Built Exclusively for ...
(Online Tools)

Labels on funnel inputs:
- Print Ads
- Online
- Direct Mail
- Socia Media

Current State

Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Sources: Existing Lists, Joint Venture, Affiliates, PPC/PPV, FB Ads, Media Buys, Live Conferences/Webinars **Traffic:** Not Marketed/mo (mlmtoolsuite, project 1,500/day) Exisiting Lists ~40,000	**Magnet:** Free Tour/Demo **Webform:** Y **Opt-Ins:** 0/mo (not marketed) **Conv Rt:** not marketed (other sites ~25%)	**Hand Raise:** Auto-responders - educate on various features Wow-factors - use their tools to win customers Daily webinars - promoted to opt-ins only	**Selling Model:** <$5 Trial in place Low monthly fee...direct to sale	**Cart:** Y - Order form **Upsell:** Y **Credit Card:** Y **Pmt Plans:** N	**Acct Mgr:** N (customer support in future) **Ship Prod:** Not currently **Follow Up:** Y - welcome onboard, trainings, live Q&A's	**Prod Name:** Annual contract **Timing:** Immediately after Trial sign-up	**Testimonial:** Y **Referral:** Y

Goals & Opportunities

(Visitors)	(Opt-Ins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
Go live and start marketing. Initial broadcast from affiliates, then from existing lists.	Transition exisiting webforms to infusionsoft	-Develop follow-ups to move trial users to purchase -Incorporate testimonials, focus on demonstating value, time savings, convenience	(direct to process sale)	AUTOMATE! Using API - automate account access. Also, enable updating of data.	Automate new customer welcome - direct them to available resources	Additional products in the future In app upsells	Mazimize Strategic Partnerships and Affiliates Systematize the testimonials.

Marketing Automation Plan (M.A.P.)

Flow elements:
- Power Networks / JV's
- PPC/PPV/SEO
- Affiliates
- Live Events
- Social Media
- Free Trial Lead — tag: Free Trail
- Facebook Lead — tag: Facebook
- Free Trial Follow-up
- No response
- Long-Term Nurture (Newsletter)
- Ready to buy
- Shopping Cart
- Add to Newsletter
- API Activates Membership
- New Customer Follow Up
- Satisfied
- Not Satisfied
- Upsell / New Products
- Customer Service Campaign
- Request testimonials and referrals

How to set up:
Task
Note Template
Letter Template
Discounts, Trial, and Upsell Promotions