## 2<sup>nd</sup> Draft Sales Funnel with Actions for Short Term

#1: Identification
Output: Leads

**Lead Gen**: Implement SEO strategies and run PPC campaigns on platforms like Google and social media to target homeowners interested in energy efficiency.

**Watering Holes:** Engage with communities on platforms like Home Energy forums, sustainable living blogs, and LinkedIn groups focused on green technology.

Who: The marketing team, led by the digital marketing manager like Big Leap or WebFX.

**#2: Consideration Output: Suspects** 

**Find Out About Options – Initial Dialogue**: Offer webinars and interactive demos that showcase the benefits and functionalities of Greenify's systems.

**WoO/Triggers & Confirms General Value Prop:** Use case studies and customer testimonials to highlight energy cost savings and environmental impact reduction.

Who: Sales representatives initiate these discussions, supported by technical experts for detailed inquiries.

**#3: Engagement**Output: Prospects

**Analyze Options I – Confirms Value Prop for Them**: Personalize presentations to potential customers based on their specific energy usage patterns and needs using CRM tools like Salesforce or HubSpot.

**Confirms Budget:** Discuss and negotiate pricing and payment plans; provide financing options using with finance software like QuickBooks or Xero

**Who:** Discuss and negotiate pricing and payment plans; provide financing options.

#4: Purchase Intent
Output: Qualified Prospects

**Analyze Options II – Qualify & Proposal**: Create detailed proposals that include ROI calculations and environmental benefits using PandaDoc or Proposify.

**Verbal Close & Objection Handling:** Address any concerns or objections with data-backed responses and reassurances. **Who:** Senior sales executives handle these negotiations and closings.

#5: Purchase
Output: Customers

Physically Acquire Product I – Secure Full Commitment, e.g., Purchase Order: Finalize the sales process with official purchase orders or contracts.

Pay for Product: Process payments via online transactions or through financing arrangements.

Who: Sales support staff manage the logistics and financial transactions.

#6: Loyalty

**Output: Satisfied Customers** 

**Physically Acquire the Product II – Ship/Install**: Coordinate the delivery (FedEx) and professional installation of the system.

**Customer Support - Use, Get Value, Determine Value:** Offer ongoing support and regular check-ins to ensure customer satisfaction and optimal use of the product, using support software like Zendesk or Freshdesk.

Who: Logistics teams handle shipping and installation; customer service teams provide post-purchase support.

#7: Advocacy

**Output: Evangelists** 

**Buy More**: Promote additional products or upgrades to existing customers with special offers or exclusive first-look at new features, using platforms like Mailchimp or Marketo.

**Tell Others:** Implement a referral program like ReferralCandy or Ambassador that rewards customers for bringing new clients to Greenify.

**Who:** Marketing and sales teams collaborate to develop and implement upsell strategies and manage the referral program.

## 2<sup>nd</sup> Draft Sales Funnel with Actions for Medium Term

#1: Identification
Output: Leads

**Lead Gen**: Expand lead generation strategies to include partnerships with eco-friendly home builders and real estate agents, alongside continued online campaigns like Home Depot or Lowe's.

**Watering Holes:** Explore new platforms and community events where Greenify can have a physical presence, such as green tech conferences and local eco-friendly expos.

Who: Marketing strategists work with business development teams to forge new partnerships and sponsorships.

**#2: Consideration Output: Suspects** 

**Find Out About Options – Initial Dialogue**: Incorporate an AI chatbot on Greenify's website to provide immediate, interactive responses to initial customer inquiries 24/7.

**WoO/Triggers & Confirms General Value Prop:** Utilize dynamic, targeted content personalization on the website and in email campaigns based on user behavior and preferences gathered from data analytics.

**Who:** Customer service managers oversee Al integration while content managers tailor the value proposition based on analytics insights.

**#3: Engagement**Output: Prospects

**Analyze Options I – Confirms Value Prop for Them**: Develop customer journey mapping to offer more customized solutions and follow-ups based on individual customer interactions and feedback.

**Confirms Budget:** Start introducing flexible pricing models that adapt to customer feedback and competitive market analysis using a software like PROS Pricing.

**Who:** Account managers, with support from a customer insights team, utilize advanced CRM tools to deliver personalized experiences.

#4: Purchase Intent
Output: Qualified Prospects

**Analyze Options II – Qualify & Proposal**: Refine proposals using DocuSign to include loyalty discounts for repeat customers or bundle offers that encourage larger purchases.

**Verbal Close & Objection Handling:** Train sales teams on new objection handling techniques based on common feedback received in the short term.

**Who:** Pricing specialists collaborate with sales leaders to implement flexible pricing strategies.

#5: Purchase
Output: Customers

Physically Acquire Product I – Secure Full Commitment, e.g., Purchase Order: Streamline the purchase process with enhanced e-commerce capabilities, such as a mobile-friendly purchasing platform.

**Pay for Product:** Introduce more payment methods (PayPal), including digital wallets and financing options, to reduce friction in the payment process.

**Who:** E-commerce managers upgrade the online transaction system with support from IT specialists.

#6: Loyalty
Output: Satisfied Customers

Physically Acquire the Product II – Ship/Install: Partner with FedEx Supply Chain and optimize logistics to reduce delivery times, improve installation scheduling flexibility, and enhance customer communication regarding order status.

**Customer Support - Use, Get Value, Determine Value:** Implement a proactive support system where customer service contacts customers to offer help and collect feedback regularly.

Who:Logistics coordinators and customer service team leaders focus on operational efficiency and proactive engagement.

**Buy More**: Introduce a membership program that rewards ongoing purchases with points that can be redeemed for discounts or exclusive services (Shopify).

**Tell Others:** Enhance the referral program to provide tiered rewards, increasing incentives as customers refer more people. **Who:** Loyalty program managers and referral program coordinators work to develop and enhance these programs.

#7: Advocacy
Output: Evangelists

## 2<sup>nd</sup> Draft Sales Funnel with Actions for Long Term

**#1: Identification Output: Leads** 

(IBM Watson or SAP). Watering Holes: Establish partnerships with global environmental organizations and participate in international green

Lead Gen: Invest in advanced analytics to refine target demographics and explore international markets for global expansion

technology summits (World Green Building Council, UN Climate Change Conferences). Who: The strategic marketing team collaborates with international business development managers to explore and establish

#2: Consideration **Output: Suspects** 

global market presence Find Out About Options - Initial Dialogue: Implement augmented reality (AR) experiences that allow potential customers to visualize energy savings and device functionality in their homes before purchase (Microsoft HoloLens or Google ARCore). WoO/Triggers & Confirms General Value Prop: Develop sophisticated machine learning models to personalize marketing

messages and offers based on extensive customer data over time (Amazon Web Services (AWS) Machine Learning). Who: Technology innovation teams develop AR tools and machine learning capabilities for a personalized customer journey. Analyze Options I - Confirms Value Prop for Them: Use predictive analytics to provide future energy-saving scenarios and

#3: Engagement **Output: Prospects** 

Confirms Budget: Implement dynamic pricing models that adjust based on market conditions, customer loyalty, and predictive analytics.

Who: Data scientists and account managers work together to harness big data for predictive modeling and tailored customer communications.

#4: Purchase Intent **Output: Qualified Prospects** 

future updates on services and technology advancements. Verbal Close & Objection Handling: Equip sales teams with Al-driven tools like Salesforce Einstein for real-time data to handle objections and customize closing strategies.

Physically Acquire Product I – Secure Full Commitment, e.g., Purchase Order: Enhance the customer online interface to include fully automated, seamless purchase processes that require minimal input and offer maximum customization (Shopify

Analyze Options II - Qualify & Proposal: Proposals include integration with next-generation smart home ecosystems and

Who: Pricing strategists and senior sales executives use advanced tools to refine pricing and sales tactics.

cost analyses tailored to individual patterns and preferences (Google Cloud AI or Oracle Analytics).

#5: Purchase

**Output: Customers** 

Plus). Pay for Product: Incorporate cryptocurrency and other blockchain-based payment methods to cater to a global audience and tech-savvy customers.

Who: E-commerce and IT development teams ensure cutting-edge technology integration for easy and secure transactions.

Physically Acquire the Product II - Ship/Install: Implement a global logistics network (DHL) to ensure efficient product delivery and installation services worldwide.

Customer Support - Use, Get Value, Determine Value: Establish a customer success team dedicated to ensuring customers

achieve the advertised energy savings and satisfaction.

programs.

Who: Global logistics managers and customer success teams focus on delivering consistent and high-quality service.

**#7: Advocacy Output: Evangelists** 

#6: Loyalty

**Output: Satisfied Customers** 

Buy More: Create exclusive Greenify community benefits for repeat customers, such as memberships in sustainable energy initiatives and discounts on future products (LoyaltyLion or Yotpo).

Tell Others: Develop a brand ambassador program (Ambassador or ReferralCandy) that empowers the most loyal customers to share their experiences through various channels, including social media, workshops, and conferences. Who: Community relations managers and customer engagement specialists curate and manage loyalty and ambassador