Social Media

# **Social Media Management Target Workflow**

## **Target: Businesses Needing Specific Social Media Management Services**

## **Workflow 1: Social Media Prospect Identification & Scoring**

### **Daily Social Media Prospecting (45 minutes)**

#### **Step 1: SociSpy Social Media Scan (15 minutes)**

**Tools Needed: SociSpy CRM, Social media audit checklist**

**SociSpy Configuration for Social Media Focus:**

1. **Search Parameters**
   * **Geographic radius: 25-mile range**
   * **Business types: Restaurants, Salons, Fitness, Retail, Professional Services**
   * **Employee range: 2-25 employees**
   * **Focus filter: "Poor social media presence"**
2. **Social Media Gap Indicators**
   * **Last Facebook post: 30+ days ago**
   * **Instagram account inactive**
   * **No Google My Business posts**
   * **Inconsistent posting schedule**
   * **Poor engagement rates**

**Quick Scan Process:**

1. **Export 15-20 businesses from SociSpy**
2. **Filter for businesses with clear social media needs**
3. **Prioritize service-based businesses with visual appeal**

**Decision Point: Does business meet social media criteria?**

* **✓ Active business with customers**
* **✓ Would benefit from visual content**
* **✓ Currently neglecting social media**
* **✓ Likely budget of $300-500/month**

**If YES → Continue to Step 2 If NO → Mark as "Not SM Target" and move to next**

#### **Step 2: Social Media Presence Deep Dive (20 minutes)**

**Platform-by-Platform Analysis:**

**Facebook Business Page Review:**

* **Page exists? (Y/N)**
* **Complete business information? (Y/N)**
* **Profile/cover photos professional? (Y/N)**
* **Last post date: \_\_\_\_**
* **Number of posts in last 30 days: \_\_\_\_**
* **Average likes per post: \_\_\_\_**
* **Customer reviews/ratings: \_\_\_\_**

**Instagram Business Account:**

* **Account exists? (Y/N)**
* **Business account type? (Y/N)**
* **Bio complete with contact info? (Y/N)**
* **Last post date: \_\_\_\_**
* **Number of posts in last 30 days: \_\_\_\_**
* **Story highlights present? (Y/N)**
* **Overall feed aesthetic: Poor/Fair/Good**

**Google My Business Posts:**

* **Posts in last 30 days: \_\_\_\_**
* **Photo updates regular? (Y/N)**
* **Event/offer posts? (Y/N)**
* **Customer Q&A managed? (Y/N)**

**LinkedIn Company Page (if applicable):**

* **Page exists? (Y/N)**
* **Recent updates? (Y/N)**
* **Employee engagement? (Y/N)**

#### **Step 3: Social Media Urgency Scoring (10 minutes)**

**Scoring System (Total: 20 points)**

**Content Gap Score (0-8 points):**

* **No posts in 60+ days: 4 points**
* **No posts in 30-59 days: 3 points**
* **No posts in 14-29 days: 2 points**
* **Irregular posting pattern: 1 point**

**Engagement Score (0-4 points):**

* **Zero engagement on recent posts: 2 points**
* **Very low engagement (under 5 interactions): 2 points**
* **No response to customer comments: 1 point**
* **No customer interaction: 1 point**

**Visual Quality Score (0-4 points):**

* **Poor quality/pixelated images: 2 points**
* **No branded visuals: 1 point**
* **Inconsistent visual style: 1 point**
* **No professional photos: 1 point**

**Platform Completeness Score (0-4 points):**

* **Missing on major platforms: 2 points**
* **Incomplete profile information: 1 point**
* **No business contact methods: 1 point**
* **No clear business description: 1 point**

**Social Media Urgency Rating:**

* **16-20 points: Urgent Need - Immediate contact**
* **12-15 points: High Need - Contact within 24 hours**
* **8-11 points: Moderate Need - Contact within week**
* **0-7 points: Low Priority - Long-term nurture**

## **Workflow 2: Social Media Outreach & Quick Conversion**

### **Same-Day Contact Strategy (High-urgency prospects)**

#### **Immediate Email Outreach (10 minutes per prospect)**

**Pre-Email Research (3 minutes):**

1. **Screenshot 2-3 specific social media issues**
2. **Note business type and target customers**
3. **Check recent business activity (new location, events, etc.)**
4. **Identify best contact method**

**Email Template for Social Media Gaps:**

**Subject: Noticed [Business Name]'s Facebook hasn't been updated since [Date]**

**Hi [Name],**

**I was researching local [business type] businesses for a client project and came across [Business Name].**

**I noticed your Facebook page hasn't been updated since [specific date], and your last Instagram post was [timeframe].**

**This caught my attention because businesses like yours typically see 40-60% more customer engagement when they post consistently on social media.**

**I specialize in social media management for local [business type] businesses and have a proven system that:**

**- Creates 30 days of content in advance**

**- Posts automatically at optimal times**

**- Engages with customers on your behalf**

**- Tracks what content brings in customers**

**Would you be interested in a FREE 30-day trial where I manage your social media completely? No cost, no contracts - just results.**

**If you like what you see after 30 days, we can discuss a simple monthly plan.**

**Interested? Just reply "YES" and I'll get started this week.**

**Best regards,**

**[Your Name]**

**[Phone Number]**

**Send Timing:**

* **Tuesday-Thursday, 10 AM - 2 PM local time**
* **Avoid lunch hours (12-1 PM)**

#### **Follow-up Phone Call (Same Day - 2-4 PM)**

**Call Script for Social Media Services:**

**Opening (20 seconds): "Hi [Name], this is [Your Name]. I sent you an email earlier about [Business Name]'s social media. Did you have a chance to see it?"**

**If YES - Email Seen: "Great! As I mentioned, I noticed your Facebook hasn't been updated since [date]. I'd love to offer you a completely free 30-day trial of my social media management service. Can I ask - what's been the biggest challenge with keeping up with social media?"**

**If NO - Email Not Seen: "No problem! I'm calling because I noticed [Business Name]'s social media hasn't been updated in a while. I specialize in helping [business type] businesses like yours stay active on social media without any extra work on your part. Do you have 2 minutes for me to explain how it works?"**

**Value Proposition (45 seconds): "Here's what I do: I create 30 days of content for your business, schedule it to post automatically, and engage with your customers when they comment. Most of my clients see 40-60% more customer inquiries within the first month. The best part - it's completely hands-off for you."**

**Free Trial Close (30 seconds): "I'm so confident you'll see results, I'd like to offer you a completely free 30-day trial. No cost, no contracts. I'll start this week and you can see the results. If you love it after 30 days, we can discuss a simple monthly plan. If not, no harm done. Sound fair?"**

**Objection Handling:**

* **"I don't have time": "That's exactly why I'm calling. This requires zero time from you."**
* **"We tried social media before": "What specifically didn't work? I'd love to show you a different approach."**
* **"I need to think about it": "I understand. The free trial means no risk. Would you like me to send you examples of what I do for other [business type] businesses?"**

#### **Text Message Follow-up (If phone unsuccessful)**

**Text Template: "Hi [Name], [Your Name] here - I called about the free social media trial for [Business Name]. Quick question: would you rather see examples of my work first, or should I just start the free trial this week? Either way works for me!"**

## **Workflow 3: Free Trial Delivery & Conversion Process**

### **30-Day Free Trial Implementation**

#### **Day 1: Trial Setup & Onboarding (60 minutes)**

**Client Onboarding Call (20 minutes):**

1. **Gather Business Information**
   * **Business hours and contact info**
   * **Target customer demographics**
   * **Key services/products to promote**
   * **Brand voice preferences (professional, friendly, etc.)**
   * **Any content restrictions or preferences**
2. **Social Media Account Access**
   * **Request admin access to Facebook page**
   * **Instagram business account login**
   * **Google My Business manager access**
   * **Any other relevant platforms**
3. **Set Expectations**
   * **Post frequency (daily or every other day)**
   * **Response time for customer comments**
   * **Weekly check-in schedule**
   * **How to reach you for questions**

#### **Day 1-3: Content Creation Blitz (3 hours total)**

**Content Planning Strategy:**

1. **Content Mix Formula (30 posts)**
   * **40% Educational/Tips (12 posts)**
   * **30% Behind-the-scenes/Team (9 posts)**
   * **20% Customer features/Reviews (6 posts)**
   * **10% Promotional/Sales (3 posts)**
2. **AI-Powered Content Creation Process Using Manus AI or ChatGPT:**
   * **Input business type and target audience**
   * **Generate 30 post ideas with captions**
   * **Create posting schedule**
   * **Generate hashtag suggestions**

**Content Creation Workflow:**

1. **Generate Post Ideas (30 minutes)**
   * **Use AI to create content calendar**
   * **Customize for specific business**
   * **Plan visual requirements**
2. **Create Visuals (90 minutes)**
   * **Source stock photos or use Canva**
   * **Create branded graphics**
   * **Design quote cards/tip graphics**
   * **Plan video content (if applicable)**
3. **Write Captions (60 minutes)**
   * **Craft engaging captions for each post**
   * **Include relevant hashtags**
   * **Add call-to-action elements**
   * **Optimize for platform algorithms**

#### **Day 4-30: Automated Posting & Engagement**

**Daily Tasks (15 minutes per client):**

1. **Morning Check (5 minutes):**
   * **Review scheduled posts for the day**
   * **Check for any urgent comments or messages**
   * **Adjust posting if needed for current events**
2. **Engagement Management (10 minutes):**
   * **Respond to all comments and messages**
   * **Like and engage with customer posts**
   * **Monitor brand mentions**
   * **Share customer content when appropriate**

**Weekly Tasks (30 minutes per client):**

1. **Performance Review**
   * **Track engagement metrics**
   * **Identify top-performing content**
   * **Note customer feedback patterns**
   * **Adjust content strategy if needed**
2. **Client Update**
   * **Send weekly performance summary**
   * **Share engagement highlights**
   * **Request feedback or adjustments**
   * **Plan next week's content focus**

### **Trial-to-Paid Conversion Process**

#### **Day 20: Soft Conversion Conversation**

**Check-in Call Script: "Hi [Name], how are things going with the social media trial? I wanted to check in and see what you've noticed so far."**

**Listen for feedback, then: "I'm glad you're seeing [positive results mentioned]. We still have 10 days left in the trial. Is there anything specific you'd like me to focus on for the remaining time?"**

**Plant conversion seed: "Based on what we've accomplished so far, I think continuing this after the trial would really benefit your business. We can discuss the details next week when the trial ends."**

#### **Day 28: Pre-Conversion Setup**

**Preparation Tasks:**

1. **Compile Trial Results Report**
   * **Engagement metrics comparison**
   * **New followers gained**
   * **Customer inquiries generated**
   * **Positive feedback received**
2. **Create Continuation Proposal**
   * **Monthly service package options**
   * **Pricing structure**
   * **What's included in ongoing service**
   * **Contract terms**

#### **Day 30: Conversion Call (30 minutes)**

**Call Structure:**

**Results Presentation (10 minutes): "Let's review what we accomplished in the past 30 days:**

* **Posted [X] times with [X%] engagement increase**
* **Gained [X] new followers**
* **Generated [X] customer inquiries**
* **Received [positive feedback examples]"**

**Transition Question (5 minutes): "Based on these results, how valuable has this been for your business?"**

**Service Continuation Proposal (10 minutes): "I'd love to continue helping you maintain this momentum. Here's what I propose for ongoing service:**

**Standard Package - $350/month:**

* **15 posts per month**
* **Daily engagement management**
* **Monthly performance report**
* **Customer message responses**

**Premium Package - $500/month:**

* **20 posts per month**
* **Daily engagement + Google My Business posts**
* **Weekly strategy calls**
* **Customer review management**
* **Monthly content strategy adjustments"**

**Close (5 minutes): "Which package feels like the right fit for [Business Name]?"**

**Objection Handling:**

* **Price concerns: Emphasize ROI and cost per customer acquisition**
* **Need to think: Offer limited-time trial pricing or payment plans**
* **Budget timing: Suggest starting date that works with their budget cycle**

## **Workflow 4: Social Media Service Delivery & Scaling**

### **Monthly Service Delivery Routine**

#### **Week 1: Planning & Content Creation (3 hours per client)**

**Monday: Monthly Planning (45 minutes)**

1. **Previous Month Analysis**
   * **Review engagement metrics**
   * **Identify top-performing content**
   * **Note customer feedback trends**
   * **Plan content improvements**
2. **Current Month Planning**
   * **Create content calendar**
   * **Plan promotional campaigns**
   * **Schedule special events/holidays**
   * **Set monthly engagement goals**

**Tuesday-Thursday: Content Creation (45 minutes daily)**

1. **Content Batch Creation**
   * **Write all captions for the month**
   * **Create/source all visuals**
   * **Schedule posts in management tool**
   * **Prepare engagement responses**

#### **Week 2-4: Daily Management (15 minutes per client daily)**

**Daily Routine:**

1. **Morning Review (5 minutes)**
   * **Check scheduled posts**
   * **Review overnight comments/messages**
   * **Monitor for urgent customer service needs**
2. **Engagement Block (10 minutes)**
   * **Respond to all comments and messages**
   * **Like customer posts and comments**
   * **Share relevant customer content**
   * **Monitor brand mentions**

**Weekly Tasks (30 minutes per client):**

1. **Performance Tracking**
   * **Monitor key metrics**
   * **Screenshot positive feedback**
   * **Track customer inquiries from social media**
   * **Note areas for improvement**
2. **Client Communication**
   * **Send weekly summary**
   * **Share engagement highlights**
   * **Request feedback or adjustments**
   * **Plan any special campaigns**

### **Scaling Workflow for Multiple Clients**

#### **Batch Processing Strategy**

**Monday: All Client Planning (3-4 hours)**

* **Plan content for all clients simultaneously**
* **Create content calendars for full month**
* **Batch similar content types across clients**

**Tuesday-Wednesday: Content Creation Days (4-6 hours)**

* **Create visuals for all clients**
* **Write captions in batches**
* **Schedule all posts for the month**
* **Set up automated responses**

**Thursday-Friday: Daily Management Setup (2-3 hours)**

* **Set up monitoring systems**
* **Create engagement response templates**
* **Schedule check-in calls**
* **Prepare monthly reporting templates**

#### **Client Management Systems**

**Tools for Scale:**

* **Social Media Management: Later, Buffer, or Hootsuite**
* **Client Communication: Slack or client portal**
* **Performance Tracking: Google Sheets or dashboard tool**
* **Visual Creation: Canva Pro with brand templates**

**Quality Control Checklist:**

* **Daily engagement within 2 hours**
* **All customer questions answered within 4 hours**
* **Weekly performance updates sent**
* **Monthly strategy calls scheduled**
* **Consistent posting schedule maintained**

## **Social Media Workflow Success Metrics**

### **Daily KPIs (Per Client)**

* **Posts published: 1-2**
* **Comments/messages responded to: All within 2 hours**
* **Engagement actions taken: 5-10**
* **Customer service issues resolved: All same day**

### **Weekly KPIs (Per Client)**

* **Engagement rate improvement: 5-15%**
* **New followers gained: 5-25**
* **Customer inquiries generated: 1-5**
* **Client satisfaction score: 8/10+**

### **Monthly KPIs (Overall Business)**

* **Free trial conversion rate: 60%+**
* **Client retention rate: 85%+**
* **Average client value: $350-500/month**
* **Time per client per day: 15 minutes maximum**

### **Scaling Targets**

* **Month 1-3: 5-10 clients maximum**
* **Month 4-6: 10-20 clients with VA support**
* **Month 7-12: 20-40 clients with team systems**
* **Year 2+: 50+ clients with automated systems**

### **Quality Assurance Checkpoints**

* **Daily client engagement review**
* **Weekly performance metric analysis**
* **Monthly client satisfaction surveys**
* **Quarterly service delivery audits**
* **Annual pricing and service optimization**

**This social media-focused workflow enables rapid client acquisition and delivery of specific social media management services with clear value demonstration and systematic scaling potential.**

Full Digital Transformation

# **SMB Comprehensive Digital Marketing Workflow**

## **Target: Small-Medium Businesses Needing Full Digital Transformation**

## **Workflow 1: SMB Prospect Identification & Qualification**

### **Daily Prospecting Routine (60 minutes)**

#### **Step 1: Business Discovery (20 minutes)**

**Tools Needed:** SociSpy CRM, Google Maps, Local directories

**Actions:**

1. **Launch SociSpy CRM**
   * Select geographic radius (25-mile range)
   * Target business types: Contractors, Professional Services, Restaurants, Retail
   * Set employee range: 5-50 employees
2. **Initial Business Scan**
   * Export 10-15 businesses from search results
   * Focus on businesses operating 2+ years
   * Prioritize service-based businesses with local customer base

**Decision Point:** Does business meet basic criteria?

* ✓ Local business with physical location
* ✓ 2+ years in operation
* ✓ Service-based or customer-facing
* ✓ Likely revenue $500K+ annually

**If YES → Continue to Step 2** **If NO → Mark as "Not Qualified" and move to next prospect**

#### **Step 2: Digital Presence Audit (25 minutes)**

**Tools Needed:** Web browser, screenshot tool, audit checklist

**Website Analysis:**

1. **Website Quality Check**
   * Does business have a website? (Y/N)
   * Is website mobile-responsive? (Y/N)
   * Last update/copyright date?
   * Contact forms present? (Y/N)
   * Call-to-action buttons clear? (Y/N)
2. **SEO Quick Check**
   * Google search: "[Business Name] + [City]"
   * Does business appear in top 3 results? (Y/N)
   * Google My Business listing complete? (Y/N)
   * Number of Google reviews: \_\_\_\_
3. **Social Media Presence**
   * Facebook business page exists? (Y/N)
   * Last Facebook post date: \_\_\_\_
   * Instagram business account? (Y/N)
   * LinkedIn company page? (Y/N)
   * Overall social media activity level: Poor/Fair/Good

**Digital Presence Score Calculation:**

* **Website Issues (0-4 points)**
  + No website: 4 points
  + Outdated website (2+ years): 3 points
  + Poor mobile experience: 2 points
  + Missing contact forms: 1 point
* **SEO Issues (0-3 points)**
  + Not in top 3 Google results: 2 points
  + Incomplete Google My Business: 2 points
  + Less than 10 reviews: 1 point
* **Social Media Issues (0-3 points)**
  + No social media presence: 3 points
  + Inconsistent posting (30+ days): 2 points
  + Poor content quality: 1 point

**Total Score: \_\_\_/10**

**Decision Point:** Is this a qualified prospect?

* **Score 7-10:** Hot Lead - Immediate contact
* **Score 4-6:** Warm Lead - Add to nurture sequence
* **Score 0-3:** Cold Lead - Long-term follow-up only

#### **Step 3: Contact Information Research (15 minutes)**

**Tools Needed:** LinkedIn, company website, business directories

**Research Checklist:**

1. **Decision Maker Identification**
   * Business owner name: \_\_\_\_
   * Manager/Marketing contact: \_\_\_\_
   * LinkedIn profile found? (Y/N)
2. **Contact Details**
   * Business phone: \_\_\_\_
   * Email address: \_\_\_\_
   * Physical address: \_\_\_\_
   * Best contact method: Phone/Email/LinkedIn
3. **Business Intelligence**
   * Years in business: \_\_\_\_
   * Number of employees (estimate): \_\_\_\_
   * Primary services offered: \_\_\_\_
   * Main competitors: \_\_\_\_

**Deliverable:** Complete prospect profile ready for outreach

## **Workflow 2: SMB Outreach & Engagement Process**

### **Initial Contact Sequence (Multi-channel approach)**

#### **Day 1: Research & First Email**

**Time Required:** 15 minutes per prospect

**Pre-Contact Research:**

1. Visit business website and social media
2. Take screenshots of specific issues
3. Identify 2-3 concrete improvement opportunities
4. Note any recent business developments (new location, awards, etc.)

**Email Template Selection:** Choose based on primary issue identified:

* **Website Issues:** Use "Website Audit" template
* **SEO Problems:** Use "Local Search Visibility" template
* **Social Media Gaps:** Use "Online Presence Review" template

**Email Composition Checklist:**

* ✓ Personalized subject line with business name
* ✓ Specific observation about their business
* ✓ One concrete example of missed opportunity
* ✓ Clear value proposition
* ✓ Low-commitment call to action
* ✓ Professional signature with credentials

**Send Criteria:**

* Send between 9 AM - 11 AM or 2 PM - 4 PM local time
* Tuesday through Thursday for best response rates
* Avoid Mondays and Fridays

#### **Day 3: LinkedIn Connection (If applicable)**

**Time Required:** 5 minutes per prospect

**LinkedIn Outreach Process:**

1. Find business owner/decision maker on LinkedIn
2. Send personalized connection request
3. Reference initial email in connection message
4. Avoid sales pitch in connection request

**Connection Message Template:** "Hi [Name], I sent you a quick email about [Business Name]'s online presence. I'd love to connect and share some insights about local business marketing in [City]."

#### **Day 5: Follow-up Email**

**Time Required:** 10 minutes per prospect

**Follow-up Email Structure:**

1. Reference original email
2. Add new value (industry insight, case study, etc.)
3. Different call to action (phone call vs. meeting)
4. Create urgency without being pushy

**Value-Add Options:**

* Local competitor analysis
* Industry trend report
* Quick tip relevant to their business
* Case study from similar business

#### **Day 8: Phone Call Attempt**

**Time Required:** 5-10 minutes per prospect

**Pre-Call Preparation:**

* Review all previous communications
* Prepare opening statement (30 seconds)
* Have specific examples ready
* Set clear call objective

**Call Structure:**

1. **Opening (30 seconds)**
   * Introduce yourself and company
   * Reference previous email
   * Ask for permission to continue
2. **Value Statement (60 seconds)**
   * Specific observation about their business
   * Quantified opportunity
   * Brief credibility statement
3. **Discovery Questions (2-3 minutes)**
   * Current marketing challenges
   * Goals for business growth
   * Budget/timeline considerations
4. **Next Step (30 seconds)**
   * Propose specific next action
   * Confirm availability
   * Send calendar link if interested

**Call Outcome Documentation:**

* Contact made: Y/N
* Decision maker reached: Y/N
* Interest level: High/Medium/Low/None
* Next step scheduled: Y/N
* Follow-up required: Y/N

#### **Day 12: Final Value Email**

**Time Required:** 10 minutes per prospect

**Final Outreach Strategy:**

* Provide substantial value with no strings attached
* Include free resource (audit, guide, checklist)
* Position as helpful expert, not salesperson
* Leave door open for future contact

**Content Options:**

* Free digital marketing audit report
* Local SEO checklist
* Website conversion optimization guide
* Social media content calendar template

## **Workflow 3: SMB Consultation & Proposal Process**

### **Discovery Call Workflow (45 minutes)**

#### **Pre-Call Preparation (10 minutes)**

**Required Materials:**

* Prospect research summary
* Digital audit findings
* Industry benchmarks
* Case study examples
* Pricing structure

**Technology Setup:**

* Video conferencing platform ready
* Screen sharing capability
* Recording permission (if applicable)
* Note-taking template prepared

#### **Call Structure & Script**

**Opening & Rapport Building (5 minutes)** "Thank you for taking the time to meet with me today. I've done some initial research on [Business Name] and I'm excited to share what I found and learn more about your goals. Before we dive in, can you tell me a bit about your biggest challenges with marketing right now?"

**Discovery Phase (15 minutes)** **Key Questions:**

1. "What marketing activities are you currently doing?"
2. "How do most of your customers find you?"
3. "What's your biggest frustration with your current online presence?"
4. "If you could improve one thing about your marketing, what would it be?"
5. "What's your timeline for making improvements?"
6. "What kind of budget have you allocated for marketing improvements?"

**Audit Presentation (15 minutes)** **Structure:**

1. **Current State Assessment**
   * Show website on mobile and desktop
   * Demonstrate Google search results
   * Review social media presence
   * Compare to top competitors
2. **Opportunity Identification**
   * Specific issues found
   * Quantified impact of each issue
   * Industry benchmarks for comparison
3. **Improvement Roadmap**
   * Priority improvements
   * Expected timeline
   * Estimated impact on business

**Solution Presentation (10 minutes)** **Service Package Options:**

1. **Essential Package ($750-1,200/month)**
   * Website optimization
   * Google My Business management
   * Monthly SEO improvements
   * Basic reporting
2. **Growth Package ($1,200-2,000/month)**
   * Everything in Essential
   * Social media management
   * Content creation
   * Lead generation systems
   * Advanced analytics
3. **Transformation Package ($2,000-3,500/month)**
   * Everything in Growth
   * Complete website redesign
   * Paid advertising management
   * Advanced automation
   * Weekly strategy calls

#### **Post-Call Follow-up (30 minutes)**

**Immediate Actions (within 2 hours):**

1. Send thank you email with meeting summary
2. Attach relevant resources discussed
3. Include next steps and timeline
4. Send calendar link for follow-up if needed

**Proposal Development (if requested):**

1. Create customized proposal document
2. Include specific recommendations
3. Detailed pricing breakdown
4. Case studies relevant to their industry
5. Clear next steps and timeline

**Follow-up Schedule:**

* Day 1: Thank you email with summary
* Day 3: Check if questions about proposal
* Day 7: Follow-up call if no response
* Day 14: Final follow-up with different angle
* Monthly: Move to long-term nurture sequence

## **Workflow 4: SMB Service Delivery & Client Onboarding**

### **New Client Onboarding Process (Week 1)**

#### **Day 1: Contract & Setup**

**Tasks (2 hours):**

1. **Contract Finalization**
   * Send signed agreement
   * Set up billing/payment processing
   * Create client portal access
   * Schedule kick-off call
2. **Account Setup**
   * Create project folder structure
   * Set up tracking systems
   * Initialize reporting dashboards
   * Assign team members

#### **Day 2-3: Discovery & Planning**

**Discovery Session (90 minutes):**

1. **Business Deep Dive**
   * Complete business profile
   * Understand customer journey
   * Identify key performance indicators
   * Review existing marketing materials
2. **Goal Setting**
   * Define 30/60/90-day objectives
   * Establish success metrics
   * Set communication preferences
   * Create project timeline

#### **Day 4-5: Technical Setup**

**Implementation Tasks:**

1. **Website Access & Analysis**
   * Gain admin access to website
   * Install analytics tracking
   * Set up conversion tracking
   * Create backup systems
2. **Social Media Account Setup**
   * Gain access to all social accounts
   * Install management tools
   * Set up posting schedules
   * Create content approval process

### **Monthly Service Delivery Workflow**

#### **Week 1: Planning & Strategy**

**Monday: Monthly Planning Session (2 hours)**

1. Review previous month's performance
2. Analyze competitor activities
3. Plan content calendar
4. Set monthly objectives

**Tuesday-Friday: Content Creation (1 hour daily)**

1. Create social media content
2. Write blog posts/website copy
3. Design graphics/visuals
4. Schedule social media posts

#### **Week 2-3: Implementation & Optimization**

**Daily Tasks (30-60 minutes per client):**

1. Monitor social media engagement
2. Respond to comments/messages
3. Update Google My Business
4. Track website performance
5. Make technical improvements

**Weekly Tasks:**

1. SEO optimization activities
2. Content publishing
3. Performance analysis
4. Client communication

#### **Week 4: Reporting & Review**

**Monthly Reporting Process (3 hours):**

1. **Data Collection**
   * Website analytics
   * Social media metrics
   * Google My Business insights
   * Lead generation data
2. **Report Creation**
   * Key performance indicators
   * Month-over-month comparisons
   * Goal achievement analysis
   * Next month's recommendations
3. **Client Review Call (30 minutes)**
   * Present monthly results
   * Discuss challenges and successes
   * Plan next month's activities
   * Address any questions/concerns

## **SMB Workflow Success Metrics**

### **Daily KPIs**

* Prospects researched: 10-15
* Outreach messages sent: 5-10
* Phone calls attempted: 3-5
* Meetings scheduled: 1-2

### **Weekly KPIs**

* New prospects added to pipeline: 50-75
* Meetings conducted: 5-10
* Proposals sent: 2-5
* Contracts signed: 1-2

### **Monthly KPIs**

* Total prospects contacted: 200-300
* Conversion rate (contact to meeting): 15-25%
* Proposal to contract conversion: 30-50%
* Average deal size: $1,200-2,000/month
* Client retention rate: 80%+

### **Quality Control Checkpoints**

* Daily prospect qualification review
* Weekly outreach message effectiveness analysis
* Monthly client satisfaction surveys
* Quarterly service delivery audits

This comprehensive SMB workflow ensures systematic approach to identifying, engaging, and serving larger businesses that need complete digital transformation with higher value service packages.