



DATABASE MARKETING

A Guide for Yodle and Sycle

Your Goal is to schedule ____ Sales Opportunities per day

Schedule Sales Opportunities for HAE, Annual Tests 3+ Users, Any Appointment Type for 3+ Users.

Calculate how many sales opportunities are needed to achieve your revenue goals!

What 3 tools can help you achieve this?

#1 Yodle Dashboard

#2 Sycle Callback Section

#3 Database Lists

#1 Yodle Dashboard

Log into the Yodle Dashboard every morning

1. Click on the left icon then go to **Leads** and the **Lead History** view.
2. To view all leads, Click **ALL**.
3. This view identifies the **Referral Source** and **Subcategory** for each call from the list.
4. Identify the Referral Source for the call and enter it in Sycle when scheduling the appointment For example; all Yodle calls are Online leads, National TV leads would be Television, Custom leads are local marketing such as Direct Mail or Newspaper. If the subcategory is not listed check with your owner.
5. Listen to the messages from the previous day prior to returning the customers call.
6. This will educate you about the customer's needs, which is valuable information to prepare for the callback and to be more efficient with your time.
7. If the name of the caller is not listed, but stated in the recording, click on **Edit** and add the name.
8. Immediately contact customers to set an appointment.
9. Remember all calls from the website tracking phone number are recorded in the Dashboard.

Rate the leads

1. Rate the calls from Yodle to provide feedback about Online marketing promotions.
2. **Good** calls are those that are inquiring about our Miracle-Ear products and services.
3. **Bad** calls have invalid information or did not intend to contact your location.
4. You should also rate calls from **Existing** customers.
5. Rate the call to correspond when you rate as **Made an Appointment**.
6. Follow up and edit the rating if a sale was made.

Check your local website

1. Stay educated about monthly marketing promotions on your website, as customers may inquire.
2. Check the accuracy of the address or store hours.



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#2 Sycle Callback List

Check the Callback List for leads 3 times daily

1. Email requests will import into the Callback list.
2. Yodle Online calls will track directly to each location. If the call is not answered, it is imported to the Callback list.
3. National TV calls will be transferred directly to the location by the National Call Center. If the call is not answered, it is imported to the Callback list.

Update the Status of Marketing Leads in the Callback List

1. Add notes and click on **Update** to mark the status **Complete** daily.
2. Don't **Archive** a prospect unless there is invalid information or they contacted Miracle-Ear by mistake. Archiving removes it from the database for future marketing.
3. A Best Practice is to call back the lead as soon as possible.
4. If unable to reach the prospect, enter a future **Callback**. Make 3 attempts to reach them.

Prospects not ready to set an appointment

1. The primary focus of the call is to set the appointment and begin building trust with the prospect.
2. When an appointment is not possible, set up a future **Callback**. For example, a prospect needed to check with a family member for transportation, or you tried 3 times and were not able to contact.
3. If the prospect was not ready to set an appointment, but had potential to be a good lead, ask if they would like a hearing loss information packet sent to them.
4. If prospect agrees, Activate the **Fulfillment Kit** (hearing loss information packet) to automatically mail to them (check with franchise owner).
5. To send the packet, click on the **Activity** button in the Customer Summary or the Customer List. Select the Referral Source and Subcategory. Select Information Request. Click **Save**.
6. The packet will be mailed to the customer within 7 days. A Callback will appear in approx 14 days as a reminder to call the customer. Inquire if they received the packet and invite them to schedule a Hearing Aid Evaluation.



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#3 Database Marketing Lists

Use the following lists to schedule appointments for Current Customers

1. CRM Sent Mail report – Click on the underlined number in any of the following lists Birthday Card, Warranty Expiration, Trade Up letters, Annual Customer Retest.
2. Marketing List – Purchase Date Select the date range 3-5 years prior. Suggestion: Sort the list by the Solution and begin calling customers with Solution 3 and 4 working through the list to Solution 1.

Use the following lists to schedule HAE Appointments for Prospects

1. Sent Mail – Click on the underlined number in the **Fulfillment Kit** column These are the prospects mailed a hearing loss information packet.
2. Sent Mail – Click on the underlined number in the **Tested Not Sold** column. Prepare a strategy by discussing with your franchise owner and HCP what additional offer could be used to invite them back. Some examples are the offer from a new monthly promotion or product launch. Tested Not Sold can also be found in the Marketing lists and can be sorted to search for prospects from a prior date range.
3. Marketing List – Click on the **Customer Type** report. Sort by **Prospect**.

Be Proactive

1. Look ahead on the schedule and use the tools from Yodle and Sycle to build a schedule with enough Sales Opportunities daily to achieve your store revenue goals.

Tips:

1. Become LMS certified.
2. Use Miracle-Ear scripts for incoming and outbound calls.
3. Verify all customer information at every visit including cell phone and email addresses.