

### **Phase 3: Build a Repeatable Sales & Marketing Process (Weeks 8-10)**

**Goal:** Develop a **scalable system** for acquiring and retaining customers.

- **Outcome:** You will have a **repeatable** process for bringing in **new customers consistently** before scaling.
  - **Key Deliverables:** Lead Generation Strategy, Customer Acquisition Funnel, Sales Outreach Plan, First 100 Customers.
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#### **Step 1: Develop a Repeatable & Scalable Sales Process**

##### **What You Need to Do:**

- Identify the **best customer acquisition channels** for your business.
- Test **multiple sales methods** (inbound, outbound, partnerships, etc.).


##### **Exercises & Action Items:**

##### **Identify your main sales channels:**

- **Cold outreach** (email, LinkedIn, phone calls)
- **Inbound marketing** (SEO, content, ads, referrals)
- **Partnerships & affiliates**

##### **Create a simple 3-step sales process:**

1. **Attract leads** (Cold outreach, ads, referrals).
2. **Engage & nurture** (Follow-ups, content, sales calls).
3. **Close deals** (Demos, discounts, contracts).

 **Deliverable:** Document your strategy in the Customer Acquisition Funnel Tracker.

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#### **Step 2: Build & Test an Acquisition Funnel**

##### **What You Need to Do:**

- Create a **step-by-step process** to guide customers from awareness to purchase.

##### **Exercises & Action Items:**

##### **Define the 5 Stages of Your Funnel:**

- **Awareness** (Ads, blog posts, LinkedIn, YouTube)
- **Interest** (Landing page, email list, free lead magnet)
- **Consideration** (Demos, webinars, case studies)
- **Purchase** (Checkout page, call-to-action)
- **Referral** (Loyalty program, testimonials)

✓ **Optimize each stage:**

- Use **A/B testing** to improve conversions.
- Track conversion rates using **Google Analytics or Hotjar**.

📄 **Deliverable:** Build and track your funnel in the Customer Acquisition Funnel Tracker.

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🚀 **Step 3: Create & Optimize Customer Onboarding**

♦ **What You Need to Do:**

- Ensure that new customers **quickly understand and use** your product.

🔧 **Exercises & Action Items:**

✓ **List key onboarding steps:**

- Welcome email
- Walkthrough tutorial (Loom video, guide)
- First success milestone (Getting value within 24 hours)

✓ **Set up automation tools:**

- **Intercom or Drift** (Live chat support)
- **Zapier** (Automate emails & follow-ups)

📄 **Deliverable:** Create an onboarding plan in the Customer Acquisition Funnel Tracker.

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🚀 **Step 4: Develop & Launch Marketing Assets**

♦ **What You Need to Do:**

- Create **high-value content** to attract and engage customers.


### Exercises & Action Items:

#### Develop at least 3 key marketing assets:

- Case study or testimonial
- Blog post or LinkedIn article
- Short demo video (Loom, YouTube)

#### Launch on different channels:

- Social media
- Email newsletter
- SEO blog content

 **Deliverable:** Publish at least **one marketing asset per week** in the Customer Acquisition Funnel Tracker.

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## Step 5: Start Content Marketing & SEO

### What You Need to Do:

- Use organic content to drive inbound leads.


### Exercises & Action Items:

#### SEO Checklist:

- Research **high-traffic keywords** (Use Ahrefs or Ubersuggest).
- Publish **optimized blog posts** (1-2 per week).
- Get **backlinks from industry sites**.

#### LinkedIn & Social Media Strategy:

- Post **valuable insights** related to your industry.
- Engage with potential customers in **comments & DMs**.

 **Deliverable:** Create a **content calendar** and track engagement in Customer Acquisition Funnel Tracker.

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## Step 6: Set Up Referral & Incentive Programs

◆ **What You Need to Do:**

- Encourage customers to refer **new leads** through incentives.

🔧 **Exercises & Action Items:**

✅ **Offer Referral Rewards:**

- \$10 credit for every friend referred
- Bonus feature access for referrals
- Discount for sharing on social media

✅ **Automate tracking using:**

- ReferralCandy
- Viral Loops

📄 **Deliverable:** Set up a **referral system** and track results in Customer Acquisition Funnel Tracker.

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📌 **Step 7: Optimize Customer Retention & Engagement**

◆ **What You Need to Do:**

- Reduce churn by improving **customer experience**.

🔧 **Exercises & Action Items:**

✅ **Send personalized check-ins** (Survey existing users).

✅ **Launch a customer feedback loop** (Use Typeform or Google Forms).

✅ **Analyze churn reasons & fix problems.**

📄 **Deliverable:** Document findings in the Revenue & Growth Tracking Dashboard.

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📌 **Step 8: Establish Key Performance Indicators (KPIs) for Growth**

◆ **What You Need to Do:**

- Define and track **critical business metrics**.

🔧 **Key Metrics to Track:**

✅ Customer Acquisition Cost (CAC)

✅ Conversion Rate (Leads → Paying Users)

✅ Customer Lifetime Value (LTV)

 **Deliverable:** Monitor progress using the Revenue & Growth Tracking Dashboard.

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## **Step 9: Automate Lead Generation & Sales Outreach**

### ◆ **What You Need to Do:**

- Reduce manual work by **automating sales tasks**.

### **Tools for Automation:**

- ✓ **Mailshake or Lemlist** (Cold email outreach)
- ✓ **Zapier** (Lead nurturing automation)
- ✓ **HubSpot CRM** (Track sales pipeline)

 **Deliverable:** Automate at least **one sales or marketing process**.

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## **Step 10: Get Your First 100 Customers**

### ◆ **What You Need to Do:**

- Scale what works to **acquire your first 100 paying users**.

### **Exercises & Action Items:**

- ✓ **Identify top-performing acquisition channels.**
- ✓ **Double down on what's working.**
- ✓ **Increase ad budget for best-performing campaigns.**

 **Deliverable:** Track progress in the Customer Acquisition Funnel Tracker.

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## **Step 11: Optimize Pricing for Maximum Revenue**

### ◆ **What You Need to Do:**

- Test and adjust pricing based on **customer behavior**.

### **Exercises & Action Items:**

- ✓ **Run pricing A/B tests** (Different plans, discounts).
- ✓ **Track revenue impact of price changes.**

 **Deliverable:** Optimize pricing strategy in Pricing Experiment Tracker.

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## ✦ **Step 12: Decide—Scale or Optimize?**

### ◆ **What You Need to Do:**

- Evaluate if your sales process is **ready for scaling**.

### 🔧 **Decision Criteria:**

- ✓ 100+ customers → Move to **Phase 4 (Scaling Operations)**.
- ✓ Less than 100 customers → Improve messaging, pricing, or funnel.

📄 **Final Deliverable:** Complete **Phase 3 Summary Report** in the Revenue & Growth Tracking Dashboard.