

## THE OBJECTIVE

Get leads through the funnel and turn them into  
customers.

## THE QUESTIONS

- What are the customer touch points that can be automated?
- What are the best mediums and tools for accomplishing this?
- What messaging will optimize for conversion rate?

Marketing

Call Center/  
Inside Sales  
Associate

Sales Person

sends leads

schedules leads

closes leads

## Signup Journey

## Activation Journey

## Purchase Journey

## Retention Journey

Chatbot & Automated Webinars

Phone calls & texts & email

Email

Email & Handwritten notes & phone calls

# Signup Journey

How to use live chat bots to encourage website visitors to sign up

- Recommended tools: Olark or Zendesk

# CHAT

## First time someone visits the site on homepage

- Chatbot pops up after 2 minutes on the homepage: “Hi Chris, do you have any questions about how to get started? You can ask me here or check out our FAQ page, here’s a link.”

Signup Journey

CHAT

# When someone visits 4 different pages on the blog

- Chatbot pops up: “High five! You just read four awesome articles in a row. You may want to subscribe to our email newsletter for new blog posts.”

Signup Journey

# CHAT

## After someone spends 30 seconds on the about us page

- Chatbot pops up: “Hi Chris, You might want to join this webinar with our CEO to learn more about what we do. [Click here to register.](#)
- Recommended automated webinar tool: [EverWebinar](#)

Signup Journey

CHAT

## Potential customer visits the testimonial page

- Chatbot pops up: “Thanks for reading our testimonials, Chris. I always read reviews before I buy things too. If you have any questions let me know”

Signup Journey

# Activation Journey

How to use SMS texting, phone calls and automated emails to get customers to make their first purchase & get the highest conversion rate possible.

## BEST PRACTICES FOR CALLING LEADS

- You have a 100x better chance of turning a lead into a conversion by calling them in the first 5 minutes than you do after just 30 minutes
- You can increase the percentage of leads you contact from 43% to 98% by calling 6 times, not once
- Call on minute 1, minute 10, minute 30, hour 3, and day two as an example.

## Activation Journey

- Best times to call a lead in order to convert them is between **8-10am and 4-6pm**. Before their day gets going or after it's winding down.
- Calling on Weds or Thurs gives you the best chance of reaching someone.

TEXT

## New customer signs up

- Text message is sent immediately: “Hi [lead first name]. I got your information from [lead source name]. Can you talk now?”
- Recommended SMS texting tools: Simple Texting, Follow Up Boss or Sendhub

Activation Journey

## Activation Journey

New customer has been opening & clicking emails or active on the website recently

- Bulk text

- Each rep can put a dozen or two hot leads on one list and upload them to Sendhub and bulk text them (if you do less than 25, it doesn't make you include the "reply stop to opt out")
- "Hey [first name]. It's Michael from [company name]. Do you have time to chat?"

TEXT

## Immediately after a customer signs up

- They get a call from the call center or Inside Sales Associate (ISA)
  - If they answer they either 1- hot transfer (Recommended tool: Live Transfer) or 2- set up an appointment with a dedicated sales person (Recommended tool: Calendly)
  - If they don't answer- a \*text message is sent directly from the dedicated sales person's name.

CALL

## When a customer is engaged in emails or on the site a lot recently

- ISA or rep will get an alert to make a phone call
- Recommended tool for tracking engagement: Segment

CALL

# EMAIL

## New customer signs up

- Email #1: immediately
  - Subject: [first name]
  - Body: Hi [first name], I just got your information from the form on our website. Is now a good time for you to speak?
- Recommended tools: connect your CRM to Yesware or MixMax. Or use marketing automation tools like Pardot, Marketo or Hubspot

## Activation Journey

## Activation Journey

If no response,

- Email #2: Day 2
  - Subject: re: [first name]
  - Body: Hi [first name], Just wanted to make sure you saw the email I sent yesterday. Is now a good time for you to speak?

EMAIL

# Next onboarding email

- Email #3: Day 4
  - **Subject:** Checking in
  - **Body:** I was just checking in to see if you needed anything from me today.

EMAIL

If no response to anything yet...

- Email #4: Day 7
  - Subject: Quick question
  - Body: Hi [first name], Are you still looking to buy X?

EMAIL

If no response to anything yet...

- Email #5: Day 16
  - Subject: re: Quick question
  - Body: Hi [first name], Are you still looking to buy X?

EMAIL

If no response to anything yet/not engaged...

- Day 40 since signup
  - **Subject:** re: Quick question
  - **Body:** Hi [first name], Are you still looking to buy X?

EMAIL

## After every customer signs up

- Email showing how to make your first purchase- Instructional video, GIF, PDF guide
- Recommended software for instructional video: ScreenCastify

EMAIL

## EMAIL

Activation Journey

### Some leads need more persuasion

- Stream of 4 educational emails over 2 weeks (addressing FAQs & objections & webinar invites)

## EMAIL

- Start sending product offers

- Invite to webinars

**Some stronger leads may be already to purchase**

Activation Journey

EMAIL

- Earn [dollar amount or discount] when you make your first investment with promo code [name of promo code]

## First time purchase promo

Activation Journey

# Purchase Journey

How to use email to encourage repeat purchases.

Purchase Journey

## EMAIL

# First purchase! Now what?

- Sent to immediately after someone makes their first purchase
  - **Subject:** [First name], you made your first purchase! Now what?
  - **Body:** Hi [First name], Congrats on making your first purchase! Here's what you can expect from hereon out. Include instructional video, GIF, or PDF guide
  - Recommended software for instructional video: Screencastify

## Purchase Journey

EMAIL

## New product offers

- Sent to customers who are subscribed to receive these emails
  - **Subject:** [First name], check out these new products
  - **Body:** TBD

Purchase Journey

## EMAIL

### Purchase Journey

#### Abandoned cart email

- Sent to customers who clicked on a product but didn't make a purchase
  - **Subject:** [First name], are you still interested in this product?
  - **Body:** Hi [First name], I noticed you were considering purchasing this product. I'm happy to answer any questions you may have. Are you still interested?

## EMAIL

### Purchase Journey

#### Limited time email

- Sent to customers who viewed a deal, but the offer is almost over
  - **Subject:** [First name], this deal is almost over
  - **Body:** Hi [First name], I noticed this exclusive offer is almost over and I just wanted to give you a heads up. I'm happy to answer any questions you may have. Are you still interested?

## EMAIL

### Sneak peek email

- Sent to highly valued customers to offer them exclusivity
  - **Subject:** [First name], you get a first look at this
  - **Body:** Hi [First name], Take a sneak peek at this new product.

## Purchase Journey

# Retention Journey

How to use email, handwritten notes & phone calls to keep customers coming back for more

## EMAIL

### NPS (Net Promoter Score)

Retention Journey

- Sent to customers 15 days after their first purchase and again 6 months later
  - Subject: [First name], do you have 30 seconds to share your feedback?
  - Body: Hi [First name], How satisfied are you with your experience using [company name] from 1-10?
  - Recommended tool for surveying NPS: Delighted

# PHONE

- Sales reps should call customers who selected 9-10 on NPS survey
  - Check in and see how things are going

# CHECKING IN

## Retention Journey

## HANDWRITTEN NOTE

Thank you for your loyalty & business

- After the phone call, dedicated sales rep to use Bond.co to send handwritten personalized letter.
- Create a template you can copy and paste each time and “merge tag” some personalizations.

Retention Journey

# EMAIL

## Refer a friend email

Retention Journey

- Sent to customers who rated a 9-10 on the NPS email, 2 days later
  - **Subject:** [First name], is there anyone else you know who'd like [company name]?
  - **Body:** Hi [First name], I wanted to tell you about our referral program that is offered exclusively to our most valued customers. Earn [amount of money or discount] for inviting a friend who signs up for [company name].

## EMAIL

- An email sent to every customer during the first week of each month
  - Each email is a customized recap of the customer's purchases or activity on your site.

## Your customized performance last month

### Retention Journey

## EMAIL

- RSS feed- Sent to everyone who is subscribed to the blog
  - 1 email sent per week, only if a new blog post has been added to the blog

## Blog Updates

## Retention Journey

EMAIL

## Monthly newsletter

- Sent once a month, about press mentions, product updates and blog posts, sent to everyone who has ever signed up or subscribed to the blog.
- (not automated, curated monthly)

Retention Journey

EMAIL

## Stale customer Email

- Sent to customers who have made a purchase before, but has not made a purchase in the last 6 months with promo code: [insert promo code here]

Retention Journey