SharpSpring

Grow Your Agency with Marketing Automation

Jared Beasley
Vice President Of Partnerships
SharpSpring

Tiffany Bukowski
Director of Content & Communications
Oliver+Sons

Welcome

Jared Beasley

Vice President Of Partnerships

SharpSpring

After spending years using marketing automation tools, Jared recognized their importance in the current market and made the move to join SharpSpring's quickly growing sales team. With a comprehensive background in B2B Account Sales and Management, Jared brings his expertise in identifying market opportunities and providing tailored, measurable, and effective solutions to our clients.

About SharpSpring

- Agency-focused marketing automation company
- Founded 2012, launched Jan 2014
- 1000+ agencies around the world
- Global network of support and partners

New to Marketing Automation?

Marketing automation is a suite of tools used to segment and nurture prospects with highly personalized, useful content that helps convert leads to customers and turn customers into advocates.

The 3 Key Benefits:

Drive More Leads

More than just more. Drive relevant leads that convert

Convert Leads to Sales

Close business by sending exactly the right message at exactly the right time using powerful, behavior-based communication

Optimize Your Spend

Double down on what works and axe what doesn't. Comprehensive reports make it easy.

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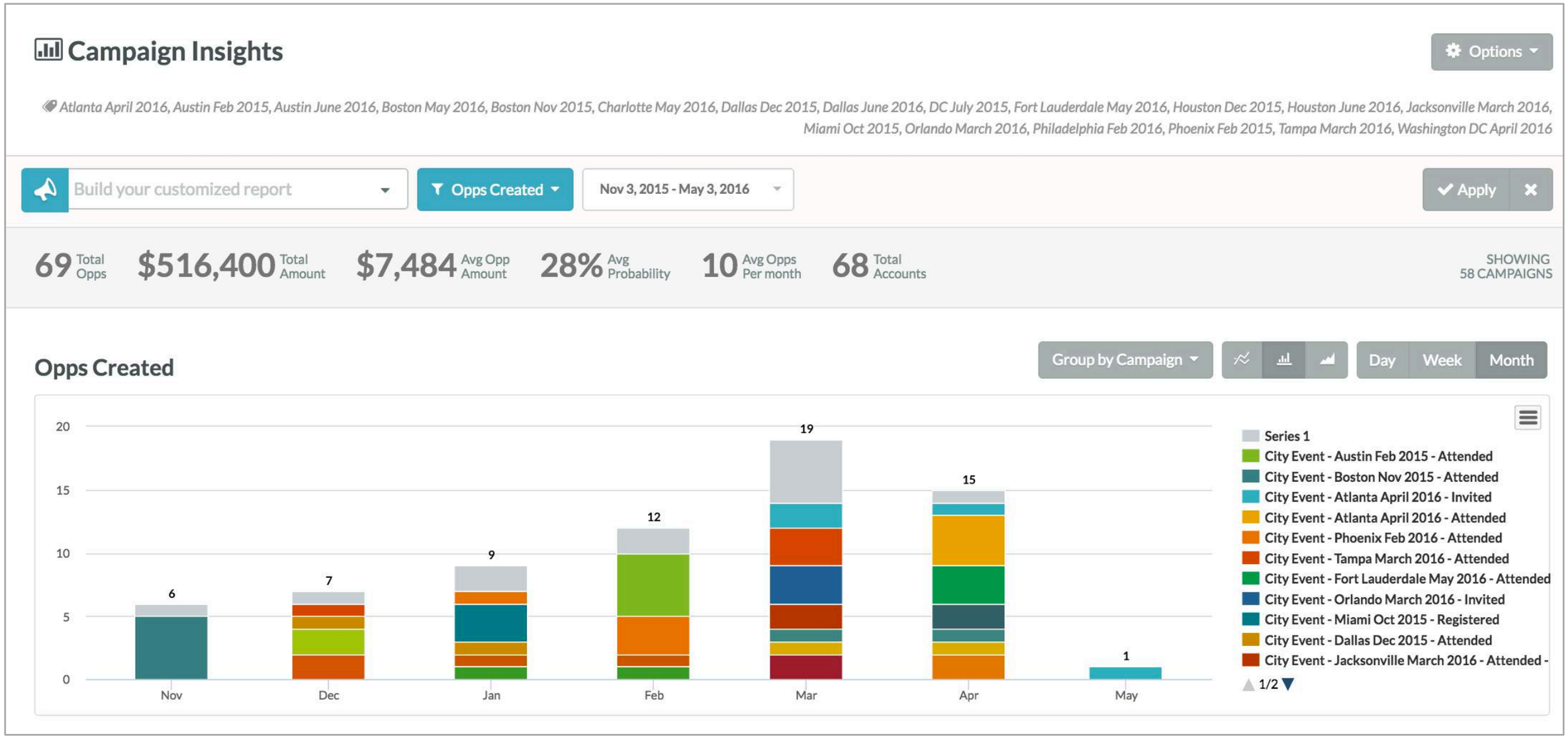
What Can You Automate?

What Can You Automate?

- Marketing/lead-gen processes
- New lead responses
- New lead assignment
- Lead organization
- Lead nurturing
- Sales processes
- Customer service processes

Automate Campaign Tracking And Reporting Processes



- No more “goal conversion” detective work!
- Know what works and what doesn’t in real time.
- Create standard reports to run monthly, weekly, daily, etc.

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Automate New Lead Response, Allocation, Organization And Nurturing

when all of the following conditions are met — RULE GROUP 1

Add the Filter : When a contact visits from the email

Select an Email | 1 time | exactly

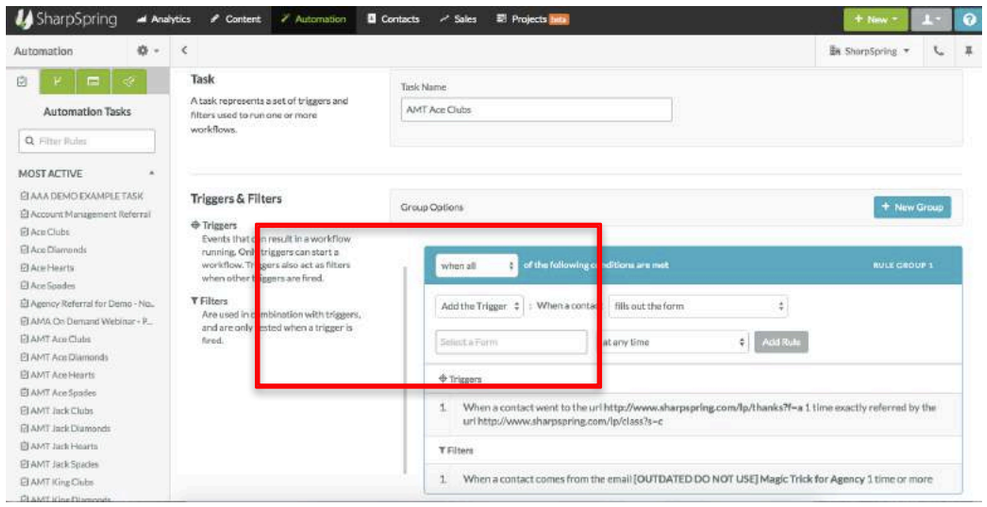
(Optional) By clicking the link Ex: http://website.com Add Rule

Triggers

1. When a contact went to the url **http://sharpspring.com/thank-you** 1 time exactly referred by any url

Filters

1. When a contact comes from the email **CRM Release** 1 time or more



Respond to a lead within 1 hour and you're 7X more likely to have a meaningful conversation than companies who take 1-2 hours to respond.

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Automate New Lead Response, Allocation, Organization And Nurturing

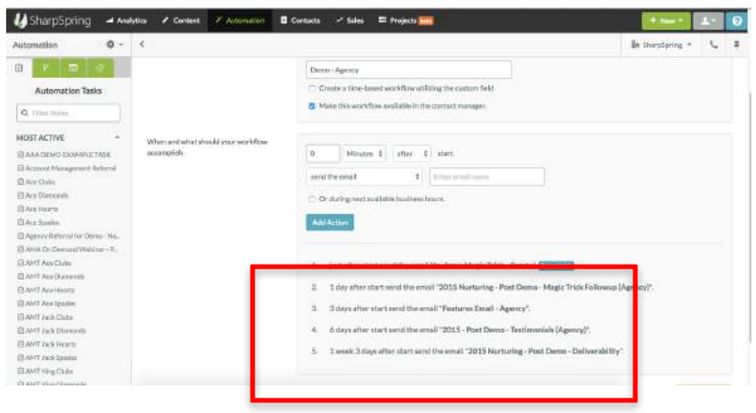
4 Days after start

send the email | Enter email name

Or during next available business hours.

Add Action

1. 1 minute after start assign lead owner to **James Davis**.
2. 1 minute after start send a notification to **Lead Owner** when available, otherwise send to **Rick Carlson** via email and via text message.
3. 1 minute after start change lead field **Communication Stage** to value **Demo Requested**.
4. 5 minutes after start send the email "**5 Ways CRMs Drive Sales**".
5. 1 day after start send the email "**[Case Study] The CRM Solution**".
6. 4 days after start send the email "**VPoP SE: SS vs. CRM Comparison Sheet**".



- 79% of marketing leads don't convert into sales
- Nurturing can generate 50% more sales-ready leads at a 33% lower cost-per-lead

https:// blog.kissmetrics.com/wp-content/uploads/2013/12/sales-infographic-6.0.pdf

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Automate Sales Processes

One attempt at contacting a lead is almost never enough to be effective.

Custom Fields

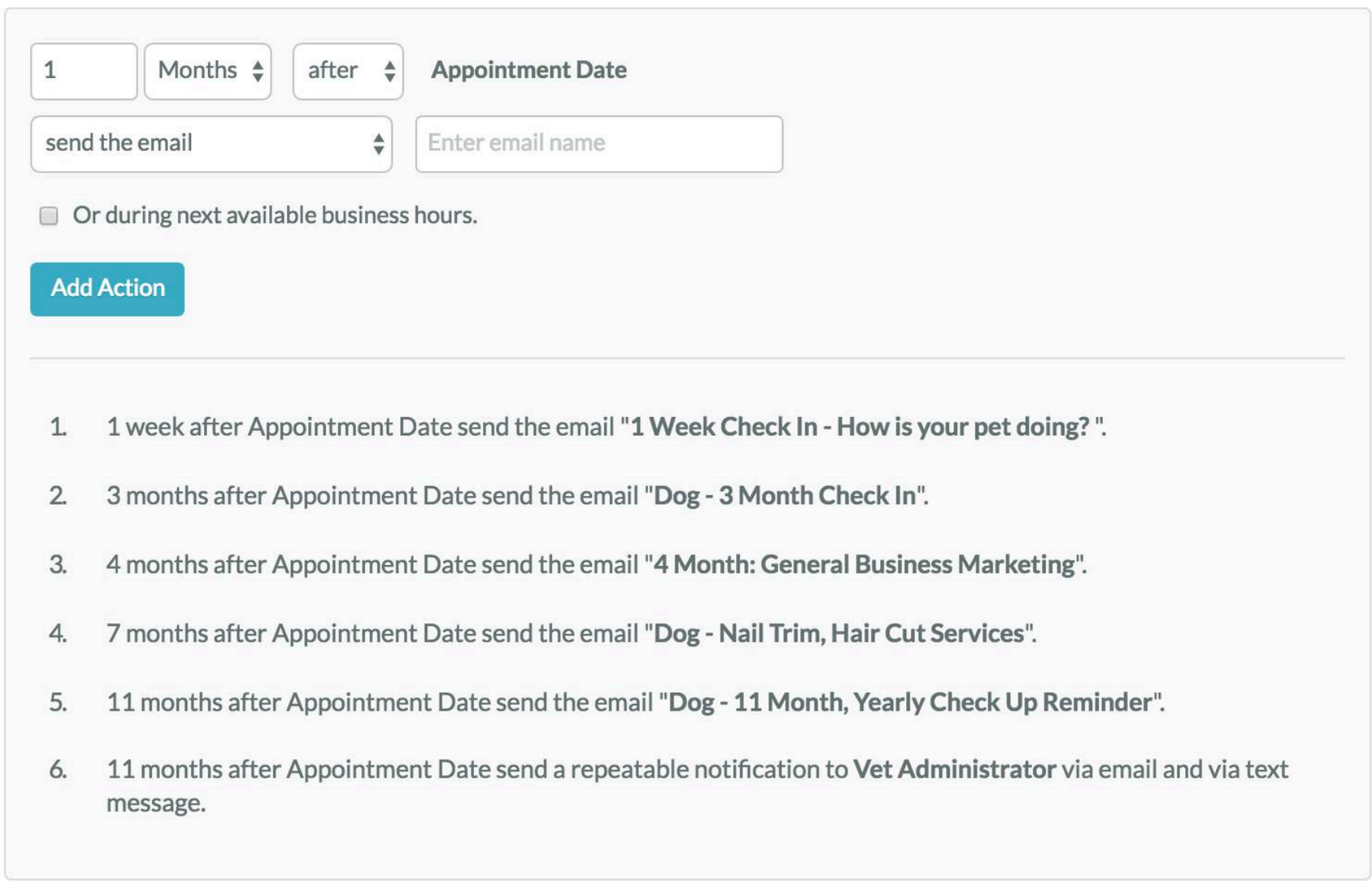
ADMINISTRATIVE

Communication Stage

- ✓ None Selected
- Prospect
- Lead
- Demo Requested
- Passed to Country Partner
- Received Email Reply
- Not Interested
- Pre-Schedule VPoP Call
- Not Scheduled Nurture-Agency
- Demo Set
- Demo
- Demo- Agency
- Demo-End User
- Reschedule (In Advance)
- Reschedule (No Show)

1. just after start send the email "**In-demo Magic Trick - Presto**". **Repeatable**
2. 1 day after start send the email "**2015 Nurturing - Post Demo - Magic Trick Followup (Agency)**".
3. 3 days after start send the email "**Features Email - Agency**".
4. 6 days after start send the email "**2015 - Post Demo - Testimonials (Agency)**".
5. 1 week 3 days after start send the email "**2015 Nurturing - Post Demo - Deliverability**".

Automate Customer Service Processes



- Appointment follow ups
- Appointment reminders
- Subscription expiration notices
- Birthday emails

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Other Ways You Can Use Automation

- Recruiting talent – use the same tactics as lead gen!
- Brand identity management – use ma to help your marketing team control all visuals by distributing them via the media library. (E.G. Templates, logos, headers/footers, overall brand look and feel)
- Event management – use ma to promote your own events. (E.G. Recruiting events, community outreach)
- New customer onboarding – automate the initial onboarding and education process. (E.G. Series of educational videos where one is sent via email only when the previous has been viewed)
- Customer education + retention – keep customers informed and educated. (E.G. Newsletters, new product launches, satisfaction surveys)
- Upselling/cross-selling – look at pages visited, papers downloaded and combine with contract info to know when someone is ready to renew or expand their service. (E.G. SS mail+ to sharpspring MA)

Featured Speaker

Tiffany Bukowski

Director of Content & Communications

Oliver + Sons

Oliver + Sons

- → Tiffany has been marketing in San Francisco for almost ten years
- → She has a wide breadth and depth of tech clients and lifestyle brands
- → She has a passion for storytelling, community management, and creative design.

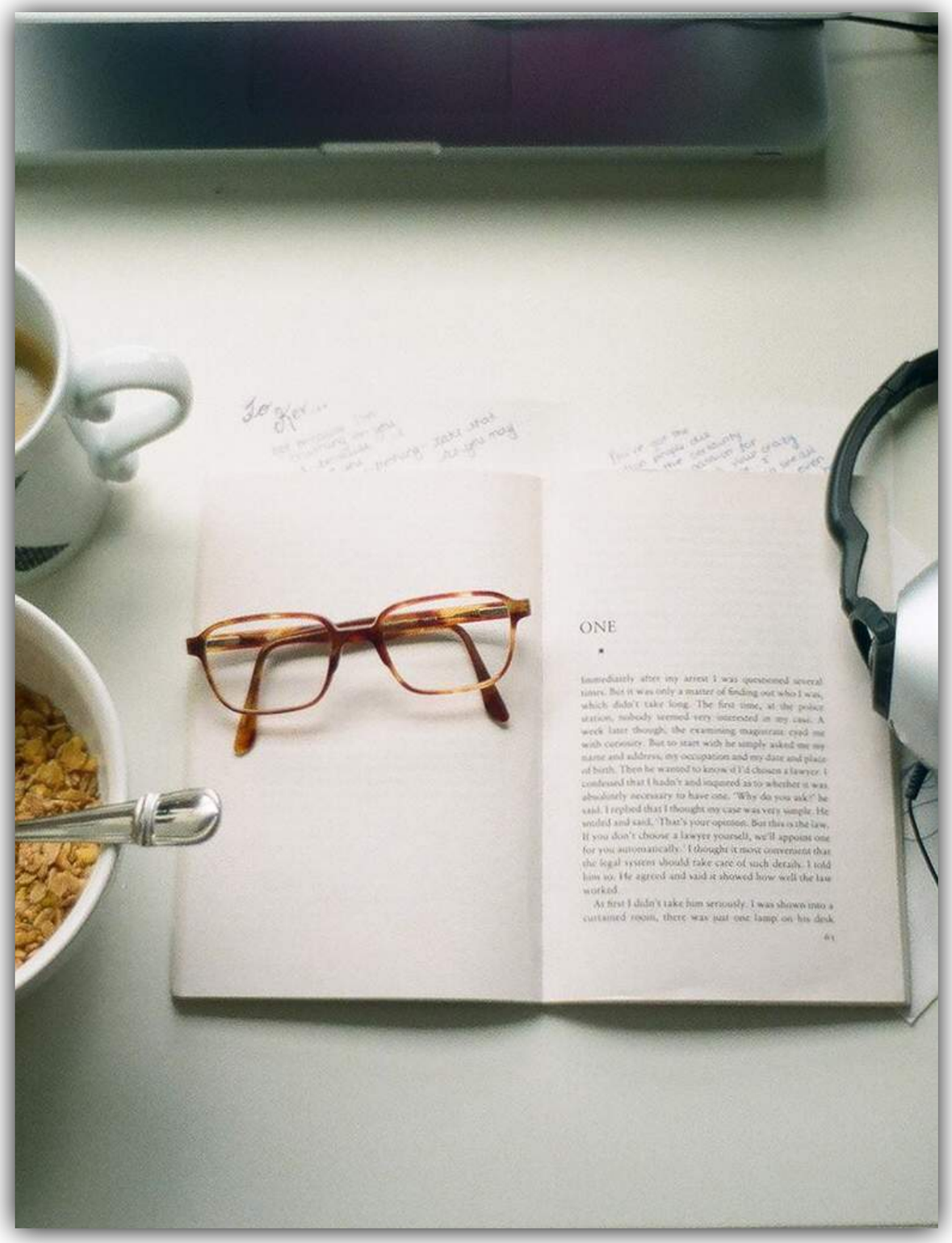
EMAIL MARKETING:
IN THE INBOX

Oliver + Sons

HELLO!

We are a small, but mighty collective, specializing in all things digital – from ROI-driven marketing programs to online brand strategy; from user experience and web analytics to integrated social media campaigns.

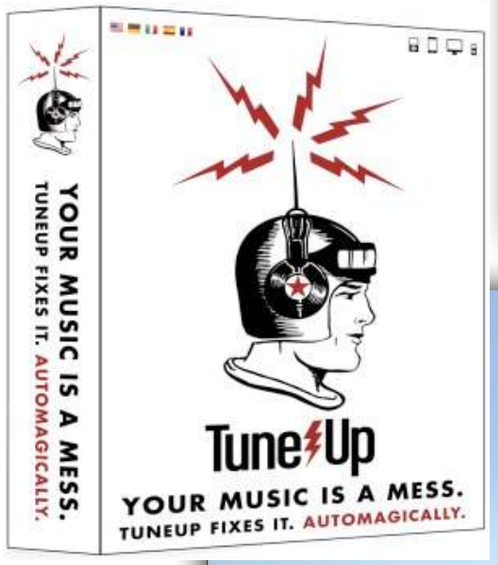
We work with our clients to allow them to thrive online, one digital punch at a time.



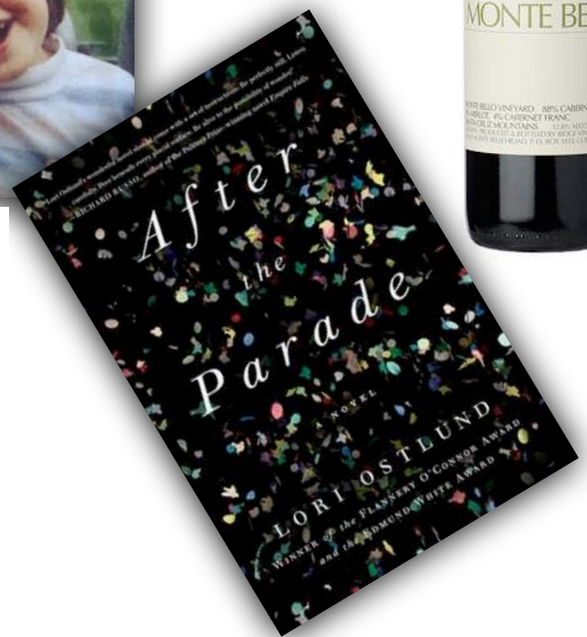
ABOUT ME

Oliver + Sons

Clever Girls™ COLLECTIVE



USC Annenberg
School for Communication and Journalism



(SOME OF) OUR CLIENTS

applian TECHNOLOGIES

Zingtree

chosen

ALBERTO FERMANI aF

TranscribeMe!

nomiku

BUT WHY EMAIL?

(YOU PROBABLY ALREADY KNOW)

- 3,800% ROI: Make $38 on every $1 spent
- B2B: 11x more organizations using marketing automation in 2014 than in 2011.
- Automated email messages average 70.5% higher open rates and 152% higher click-through rates than “business as usual” marketing messages.
- B2C marketers who leverage automation have seen conversion rates as high as 50%.
- It is our main pipeline for digital communication… still.

FIND YOUR FUNNEL

ALWAYS TRACK:

WHERE & WHEN ARE THEY LEAVING

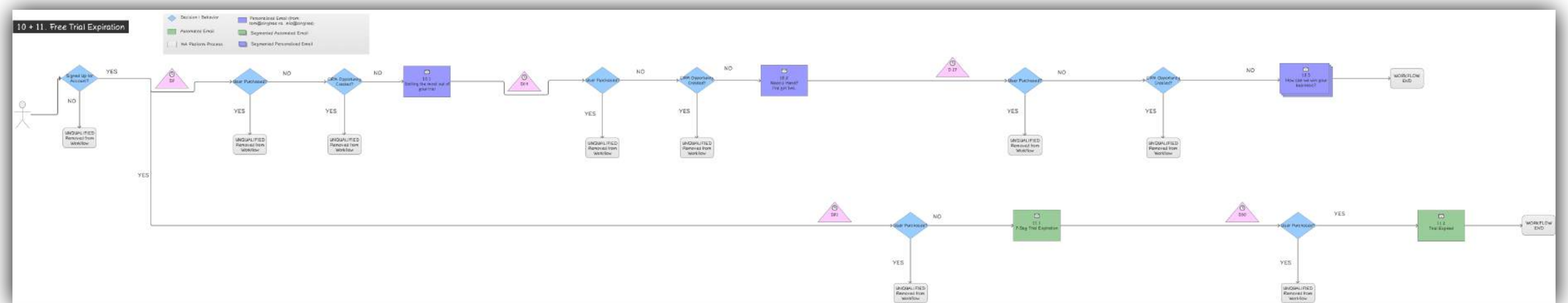
CUSTOMER PATHWAYS

TIPS & TRICKS

- Look at your website flow / conversion funnel
    - How many steps does the customer need to make to purchase? Each step is a potential email trigger
- SharpSpring tracking: add snippet of code to the pages you want to track, associates users to the campaign)
    - Anchor tab tracking lets you mark a specific location on a single page (“sign up” / “products”)
- Inspectlet: website heat-mapping and user monitoring in real-time
- Google Analytics: more granular and in-depth data about user sessions and demo

CUSTOMER PATHWAYS

EXAMPLES



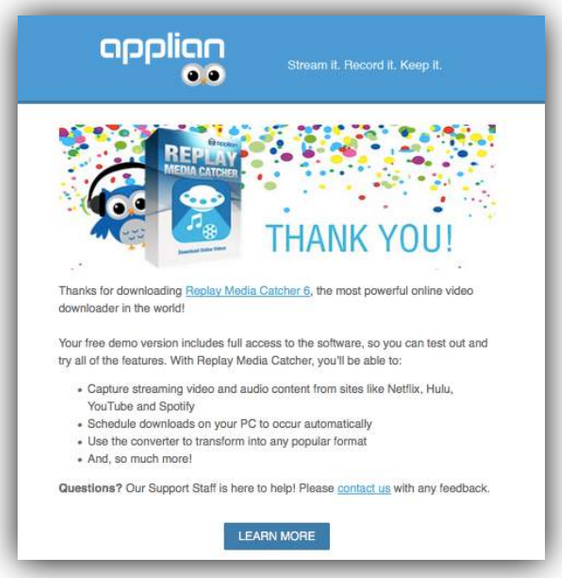
Flowchart

Source / Medium	Campaign	Acquisition			Behavior			Conversions eCommerce		
		Sessions ↓	% New Sessions	New Users	Bounce Rate	Pages / Session	Avg. Session Duration	Ecommerce Conversion Rate	Transactions	Revenue
		288 % of Total: 1.77% (16,292)	63.19% Avg for View: 61.42% (2.89%)	182 % of Total: 1.82% (10,006)	50.00% Avg for View: 60.47% (-17.31%)	2.67 Avg for View: 1.89 (41.39%)	00:04:25 Avg for View: 00:04:33 (-3.01%)	9.03% Avg for View: 1.92% (369.91%)	26 % of Total: 8.31% (313)	$1,796.80 % of Total: 7.01% ($25,641.08)
1. sharpspring / email	201608-newsletter	**178** (61.81%)	68.54%	122 (67.03%)	53.37%	2.86	00:03:05	12.92%	23 (88.46%)	$1,654.43 (92.08%)
2. sharpspring / email	201608-inbound	**61** (21.18%)	59.02%	36 (19.78%)	36.07%	2.36	00:08:40	3.28%	2 (7.69%)	$103.35 (5.75%)

Google Analytics

CUSTOMER PATHWAYS

EXAMPLES



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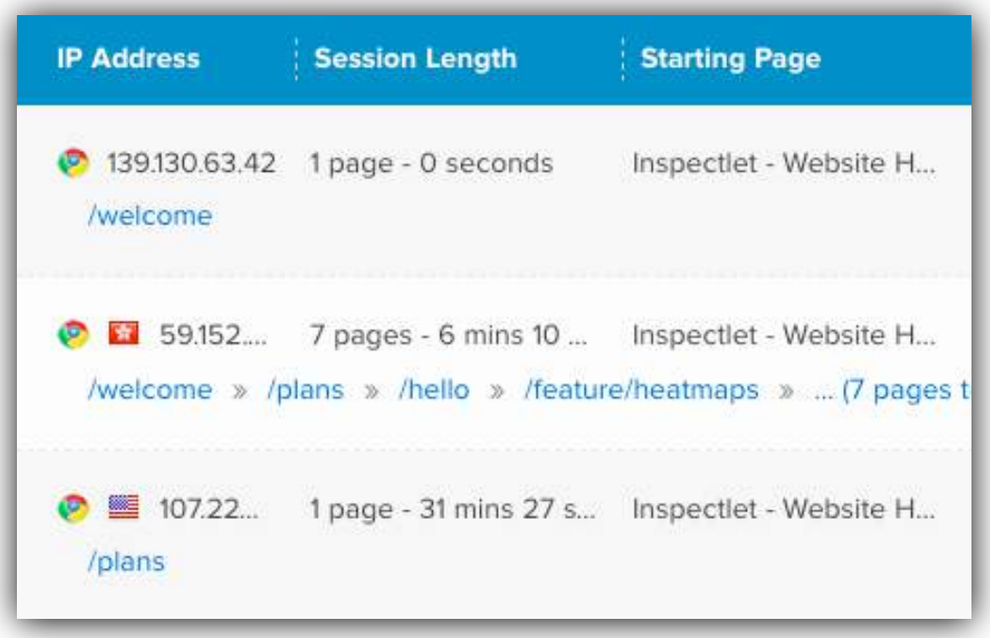


Inspectlet

DECIDE ON

A DRIP

ALWAYS ASK:

WHAT DO THEY NEED RIGHT NOW?

AUTOMATED CAMPAIGNS

CUSTOMIZED & TAILORED

- Transactional Drips

- Educational Drips

- Promotional Drips

- Re-Engagement Drips

AUTOMATED CAMPAIGNS

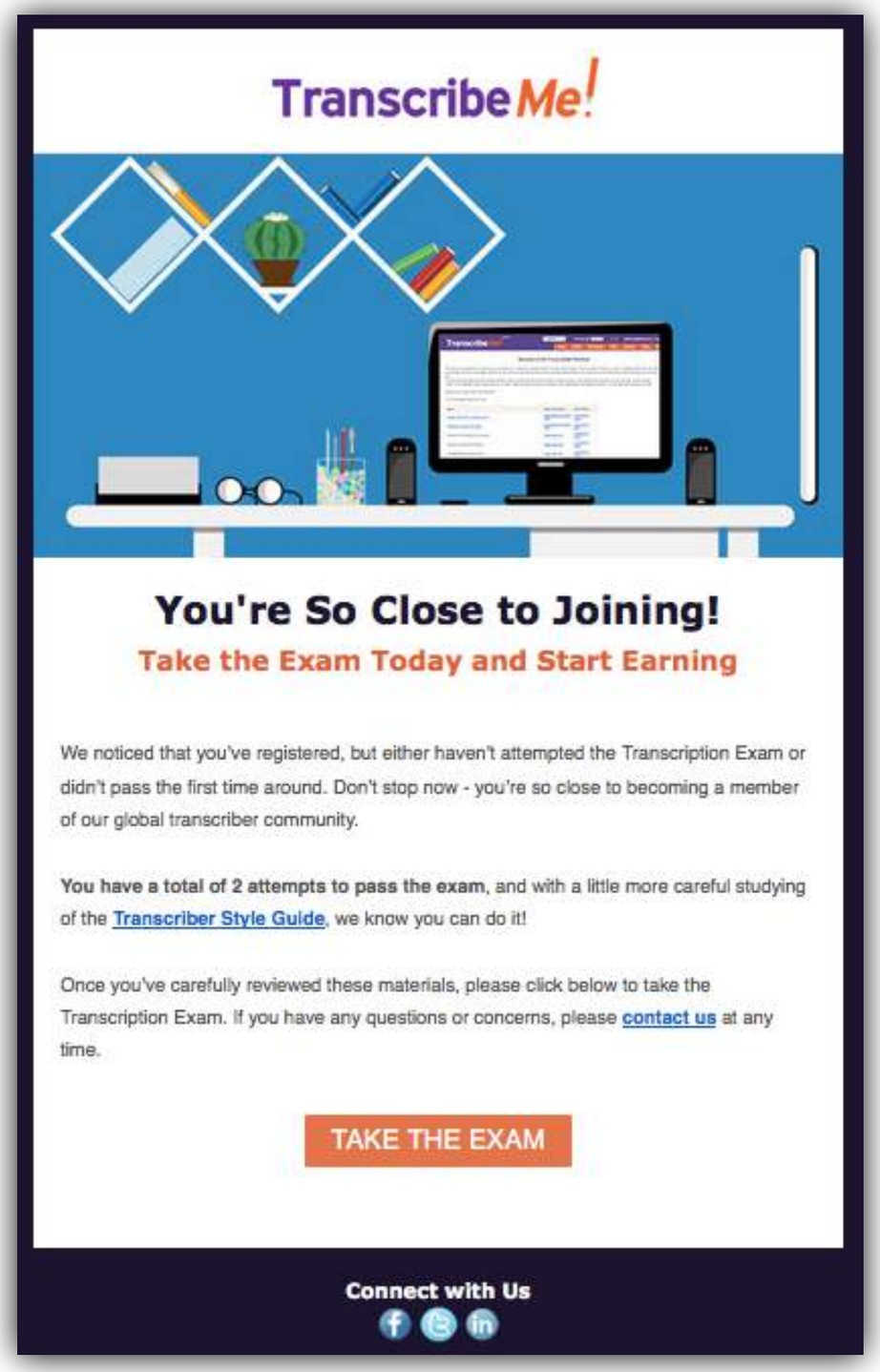
EXAMPLES

Re-Engagement

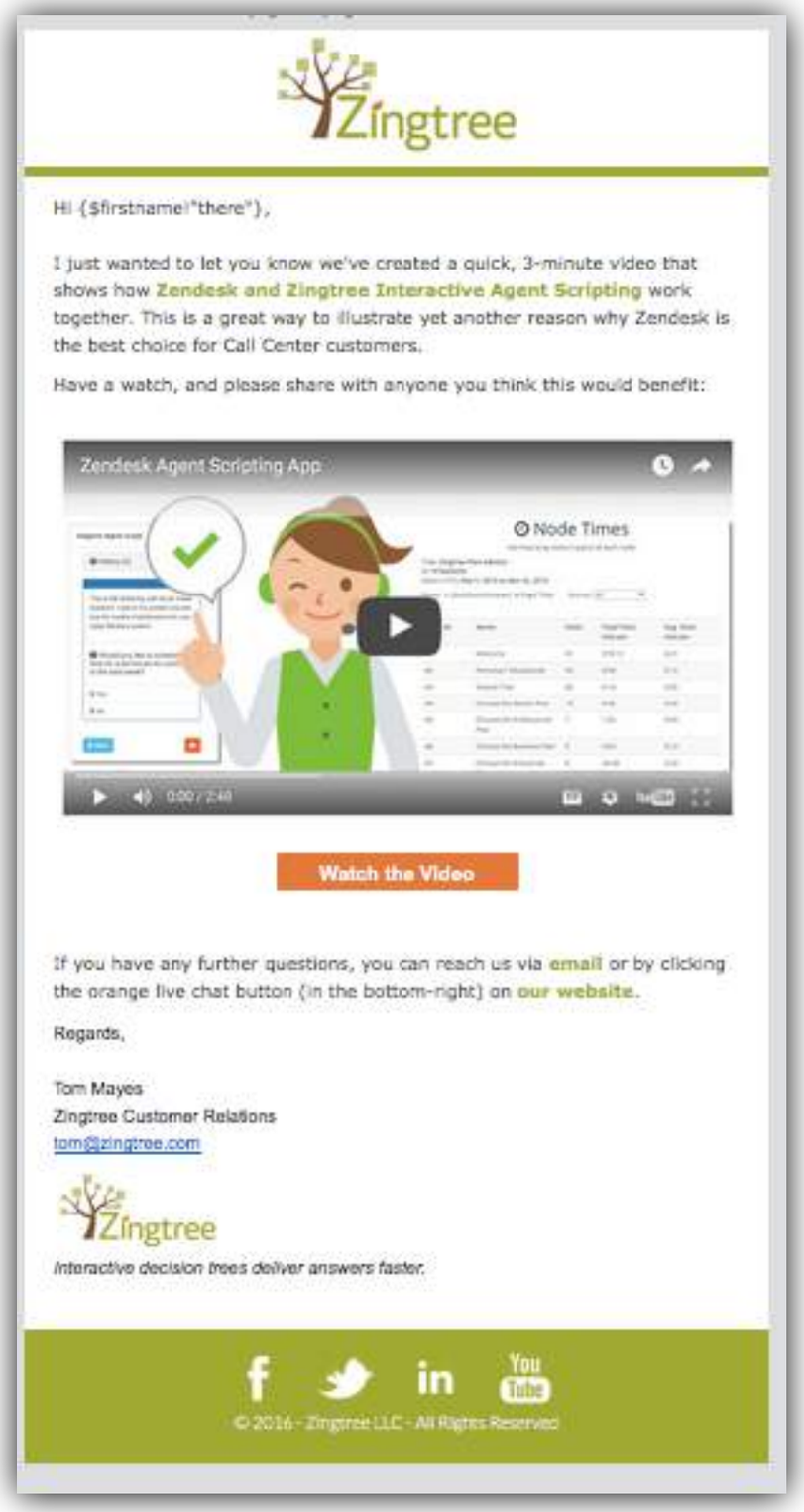
Re-Engagement

AUTOMATED CAMPAIGNS

EXAMPLES



Transactional



Educational

ABT: ALWAYS BE TESTING

ALWAYS MONITOR:

WHAT ACTUALLY WORKS

A/B TESTING

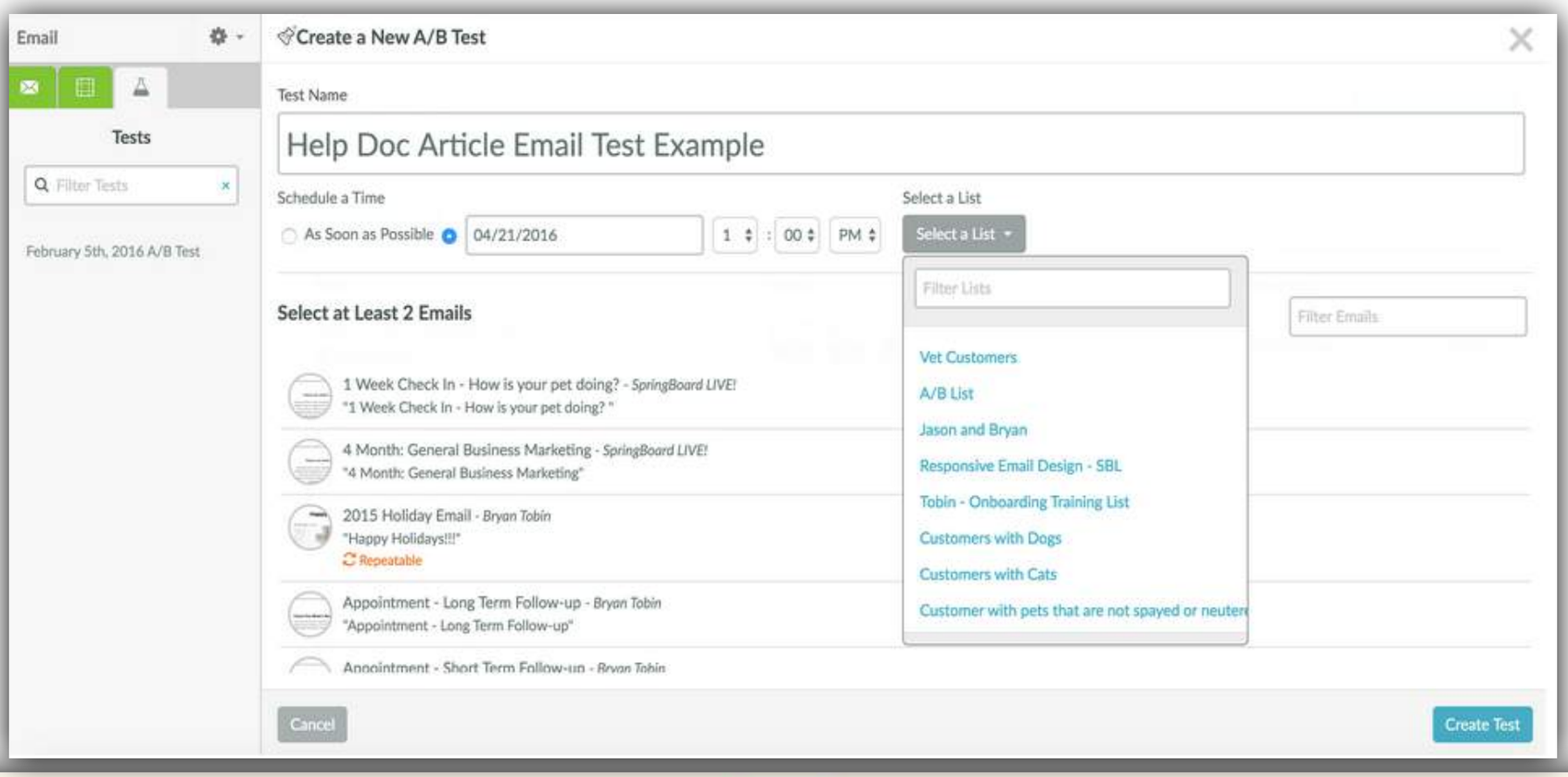
ALL THE TIME

Deploy Date	Topic	Segment / Notes	Subject Line	From Address	Emails Delivered	Opened	% Opened	Clicked	CTR (of Deliv)	CTR (of Opens)
10/10/2015	**Marketing // Consumer Promo Announcement**	*unhide rows*			**23,299**	**5,745**	**24.66%**	**154**	**0.66%**	**2.68%**
10/10/2015	**Marketing // New iOS Version Announcement**	*unhide rows*			**5,344**	**1,191**	**22.29%**	**49**	**0.92%**	**4.11%**
11/1/2015	**Support // iOS Update Bug Fix**				**859**	**105**	**12.22%**	**5**	**0.58%**	**4.76%**
11/17 + 12/2	**Support // Billing Issues**	*unhide rows*			**827**	**437**	**52.84%**	**39**	**4.72%**	**8.92%**
11/1/2015	**Marketing // Newsletter - November 2015**				**28,970**	**2,829**	**9.77%**	**103**	**0.36%**	**3.64%**
1/21/2016	**Marketing // NEWSLETTER - Jan 2016**				**29,402**	**3,611**	**12.28%**	**215**	**0.73%**	**5.95%**
1/27/2016	**Support // iOS update Report**				**5,655**	**1,198**	**21.18%**	**87**	**1.54%**	**7.26%**
2/25/2016	**Re-Engagement // Current Customers, Not Purchased in 6 Months** Testing designed vs. "personalized" apporach.	"Nathan" Version	*Have any new transcripts I can help with? Got a discount for you, too!*	nathan@	1,662	488	29.36%	10	0.60%	2.05%
		Designed Version	*Remember us? Get transcripts for a flat $1.25 / minute*	donotreply@	1,673	152	9.09%	5	0.30%	3.29%
		Total			**3,335**	**640**	**19.19%**	**15**	**0.45%**	**2.34%**
3/2/2016	**Follow Ups to Re-Engagement Email Sent on 2/25.** Testing subject lines...	*The most cost-effective way to get throu*	*The most cost-effective way to get through your To-Do List*		1,644	428	26.03%	3	0.18%	0.70%
		From Evvy at TranscribeMe	*From Evvy at TranscribeMe*	evvy@	1,631	449	27.53%	11	0.67%	2.45%
		Total			**3,275**	**877**	**26.78%**	**14**	**0.43%**	**1.60%**
3/10/2016	**Manual Consumer Promo Remarketing**	Version B // Updated Design	*Still Need Transcripts? We've got a special offer for you.*	donotreply@	607	133	21.91%	13	2.14%	9.77%
		Version A // Legacy Design			636	120	18.87%	10	1.57%	8.33%
		Total			**1,243**	**253**	**20.35%**	**23**	**1.85%**	**9.09%**
4/18/2018	Consumer Promo Remarketing $1 per Minute Offer	Monday	"We're here for you! Hurry, Special Discount inside"	sales@	511	41	8.02%	2	0.39%	4.88%
4/15/2016		Friday			509	42	8.25%	0	0.00%	0.00%
4/14/2016		**Thursday**			**504**	**52**	**10.32%**	**3**	**0.60%**	**5.77%**
4/13/2016		Wednesday			510	55	10.78%	2	0.39%	3.64%
4/12/2016		Tuesday			501	48	9.58%	4	0.80%	8.33%
April - 2016	**CP Remarketing // $1 Min Offer**	**Total**			**2,535**	**238**	**9.39%**	**11**	**0.43%**	**4.62%**
6/16/2016	**App Survey**	App User + No Submit	Have feedback? Share yours for a chance to win a $100 Amazon gift card!	sales@	9,737	1,432	14.71%	52	0.53%	3.63%
6/16/2016		Register + No Upload			3,478	359	10.32%	17	0.49%	4.74%
6/16/2016		Upload + No Purchase			1,125	132	11.73%	3	0.27%	2.27%
6/16/2016		**Total**			**14,340**	**1,923**	**13.41%**	**72**	**0.50%**	**3.74%**

- Select Variable: From Email / Date / Body Content / Subject Line

A/B TESTING

IN SHARPSPRING



TIPS & TRICKS

WHAT WE'VE LEARNED

- B2B: Frequency is key
- Date matters, and it's always different per client
- Automated email messages are best served in the AM
- For Transactional: D1, D3, D7… then, month increments
- The shorter, the better
- Strategic repetition and images over heavy text
- Use personalization (code for First Name)
- Email On Acid / SharpSpring

DEAR CLIENT...

ALWAYS REMEMBER:

WHO YOU WORK FOR… REALLY

GOTTA PLEASE EM ALL!

WHAT WE'VE LEARNED

- Ownership of email marketing: platform and production
- New Campaign Reports screenshots
- Crafting, editing, deployment, data collection
- Invest in your code: hire a template designer
- SharpSpring Shopping Cart functionality & conversion tracking
- Careful of internal crowds ($$$)
- Infinite possibilities!

THANK YOU!

@THETIFFY

TIFFANY@OLIVERANDSONS.COM

The SharpSpring Platform

Marketing Automation + CRM + Call Tracking

(full-featured) (yours or ours) (the first of its kind)

Email Automation
Send emails with triggers and build personal relationship with leads

Rebrandable
Rebrand the entire platform and reinforce your branding with clients every day

Single Sign-on
Manage all your clients from a single instance

Behavior Tracking
Understand your leads to create one-on-one communication

Dynamic Forms
Capture more leads with forms designed to convert

Dynamic Web Content
Close more sales with content that grows with your leads

Lead Scoring
Prioritize your pipeline and reach out to sales-ready leads

Campaign Optimization
Eliminate waste and identify opportunities

Sales Notifications
Email or text sales team when a lead indicates they are ready to buy

Visitor ID
Triple your leads by identifying anonymous traffic

CRM Integration
Immediately plug your leads into your sales team's system

Sales Analytics
Enable your sales team with key insights about each lead

Call Tracking
Accurately track leads generated via phone calls to campaigns

Gmail/Email Syncing
Email sent and received from IMAP clients show up right in leads' histories

A/B Testing
Test emails head-to-head to see exactly what works best

Shopping Cart Abandonment
Automatically follow up with leads' that forgo their potential purchases

Built-in CRM
Customize fields, deal stages, reports, filters and more to achieve your goals.

Open API
Connect to any custom build data system or CRM, we're api-agnostic

Social Assistant
Powerful contact insight and alerts right in your browser

Sharpspring Mobile
Easily access sharpspring and have your entire CRM in the palm of your hand

SharpSpring

Smile Marketing
Blocks
160 90
724 FACTORY
a3k|advertising|inc.
aardvark marketing consultants
ACCELERATOR MARKETING
ADHERE creative
AESPIRE
CARLON LEO MG
@AgencySquared

aniz keting
Anametrix an enlighten company
anicca
artlivemedia
attacat
BAM
bamstrategy
BBG&G
bdn AEROSPACE MARKETING
biz{net}
Black Bear Design
BLACKTIE DIGITAL MARKETING

com marketing by design
Blue Atlas Marketing
BLUE CORONA Marketing • Measure it • Improve it.
BLUEION
BMG MARKETING
Bōkka GROUP
Boxpilot
brandlogic.
BRAVEONE
britnett central
BROCKTON
seo.co.

BURDETTE KETCHUM
capture HIGHER ED
CCO HEALTHCARE PARTNERS
FOCUS Online marketing
CIM CHIEF INTERNET MARKETER
CONFLUENCE DIGITAL MARKETING STRATEGY • EXECUTION
CORE integrated marketing
Cf.
cummings

CURRENT 360 we do that
CUsolutions GROUP
THE DavidJames AGENCY LLC
delia associates IDEAS THAT LEAD
Dinkum INTERACTIVE
DIRECT BUSINESS MARKETING
elevatedthird Digital Agency

DNA intelligent marketing by design
Doe-Anderson
DOOLEY COMMUNICATIONS
DURKAN group
FAHRENHEIT MARKETING
COMPANY 1919

EMANANT
EMS INTERNET Results through digital
engage | convert performance driven marketing
essential
ethinos digital marketing
EXPERT INTERNET MARKETING
eBIZ RESULTS
FLITEHAUS creative agency
focus college

FOCUS INBOUND
hooah! INTERACTIVE COMMUNICATIONS
ICONIC DIGITAL
IDEOPIA
InsightRiot!
(IM) interactivemarketing.net
iMi Internet Marketing Intelligence
JACKSON MARKETING • MOTORSPORTS • EVENTS

MAMBO
Mann & Co Inc
MAVERICK
MTM
MMi MILITARY MEDIA INC
PIXINK
QPLES
SCIAD

Benefits For Agencies

Grow your agency. Increase your value.

Higher Value Relationships

Growing your agency by becoming an integrated and indispensable partner to your clients

Monthly Recurring Revenue

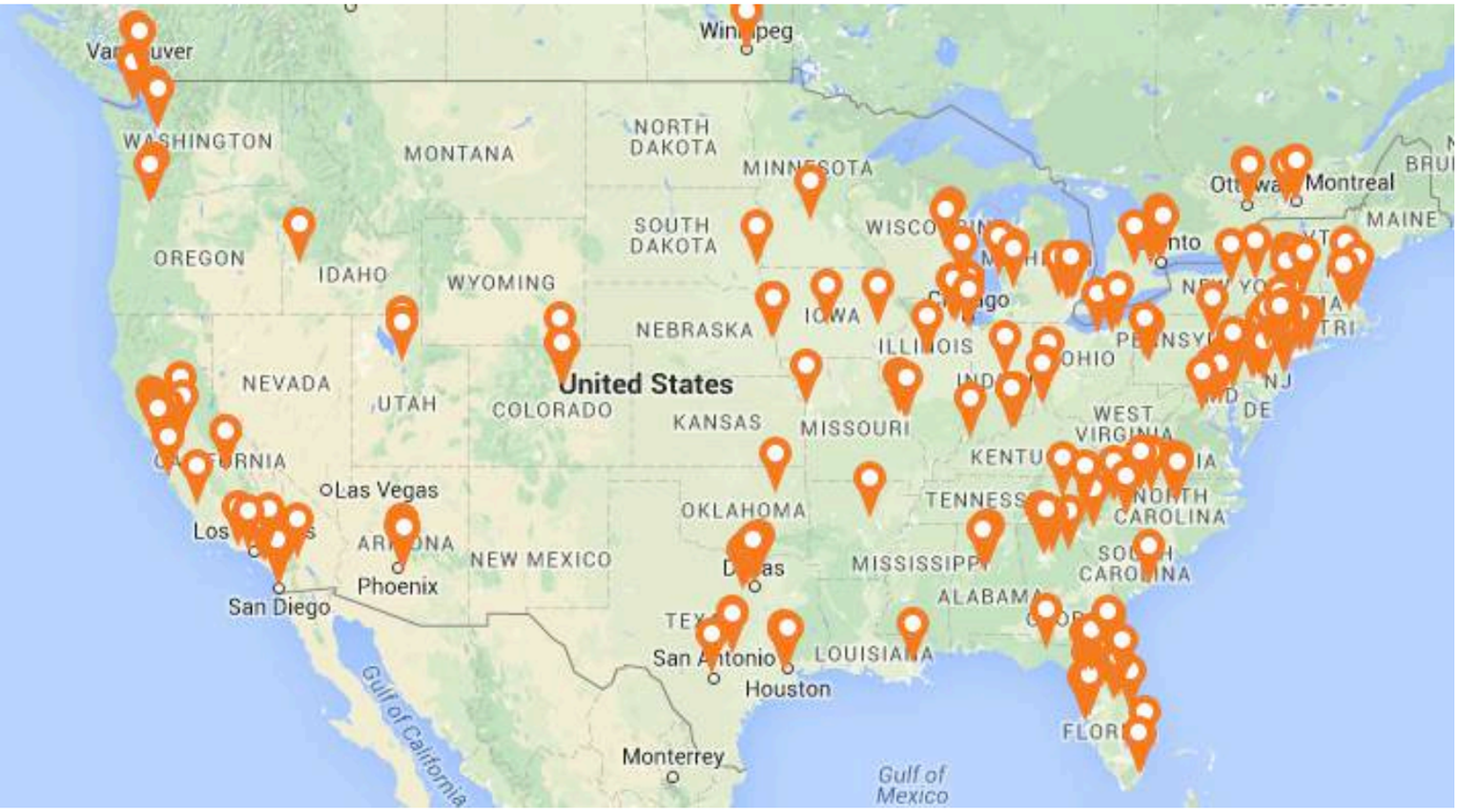
Move from unpredictable project work to retainer-based relationships

Prove Your Value To Your Clients

Show clients measurable results with comprehensive lead-to-revenue reporting

SharpSpring:
Built Around Agencies

1000+	6	23	9
Agency Partners	*Continents*	*Countries*	*Languages*



Agencies make up **95%** of our revenues

SharpSpring

Why Have All These Agencies Joined SharpSpring?

The only marketing automation company in the world focused on agencies

Agency-Focused Features

Unlimited Agency Support

Agency Pricing Model

Flexible Agency Architecture

Agency Pricing Model

3 Clients for

$500

Per Month/Total*

Our agency partners are not resellers

- → Set Client Fees (If Any)
- → Your Clients Are Yours, Not Ours
- → Fraction Of The Cost Of Competing Solutions
- → Month-To-Month Billing
- → Free For Your Agency

I've used other automated marketing platforms at another agency, however they are wildly expensive and more geared towards large business. SharpSpring was affordable enough for our small agency and our small business clients. SharpSpring is by far, my favorite 3rd-party vendor. Truthfully it is the product as a whole that really made us decide we NEEDED to use it.

Steve Buck
Black Tie Digital Marketing

Unlimited Agency Support

- → Support by phone, email or chat
- → 200+ training videos and webinars
- → 100% free

I switched to SharpSpring and I've been blown away by the customer support. The SharpSpring team is energetic and willing to go the extra mile to ensure that their customers are not just satisfied but passionate evangelists of the brand and product.

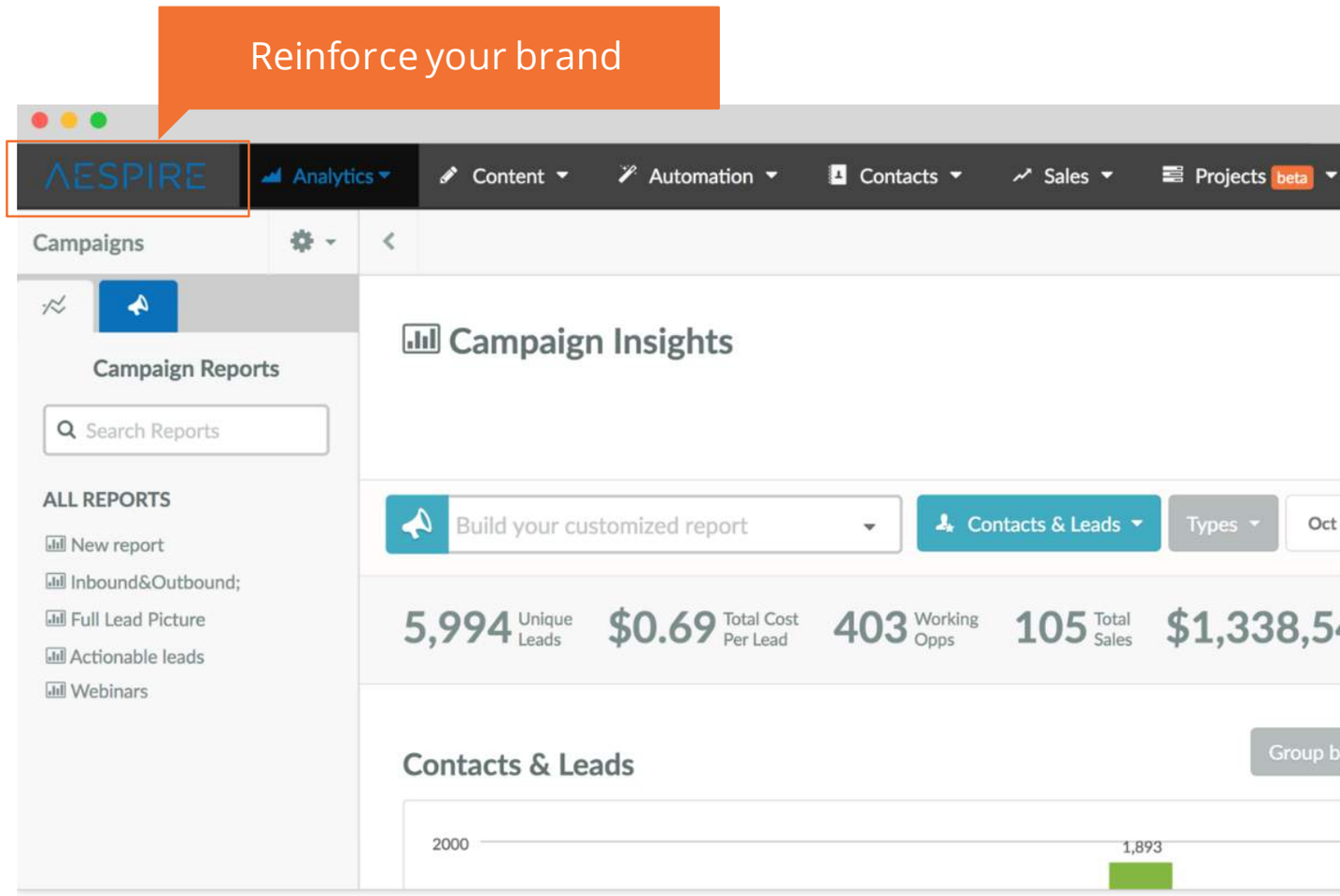
Ryan Cohn
Sachs Media Group

SharpSpring

Agency Focused Features

SharpSpring is designed to tie your customers to you

- → Rebrandable
- → Single sign-on
- → No-hassle client management
- → Flexible email templates



The features that are packed into their product offering are incredibly valuable, and their customer service is off the charts great, you really don't have to look anywhere else.

Scott Salvati
Lighthouse Marketing Services, Inc.

SharpSpring

Flexible Architecture

Start providing results for your clients immediately

- → SharpSpring integrates easily
- → Built-In or 3rd party CRM
- → We're connected

"Best marketing automation engine on the planet. Great people, great service, awesome product. We are partnered with sharpspring because we want the best-in-class for our team and clients alike. Thanks guys and keep up the terrific work."

Carlos Arnavat IV,
Studio C5, LLC

Here's How We Fit In

We aren't out to replace competing solutions

For every 1 client who can afford the expensive solutions, there are 10 who can't

Keep more of the money in your agency

Enter SharpSpring

SharpSpring

Thank you!

Questions?

SharpSpring