



The Winning Formula for Revenue Growth

Build Your Business with Lasting Customer Relationships



Aletha Royer

Director of Partner Enablement
SharpSpring



Jose Romero

Marketing Communications Manager
Potratz

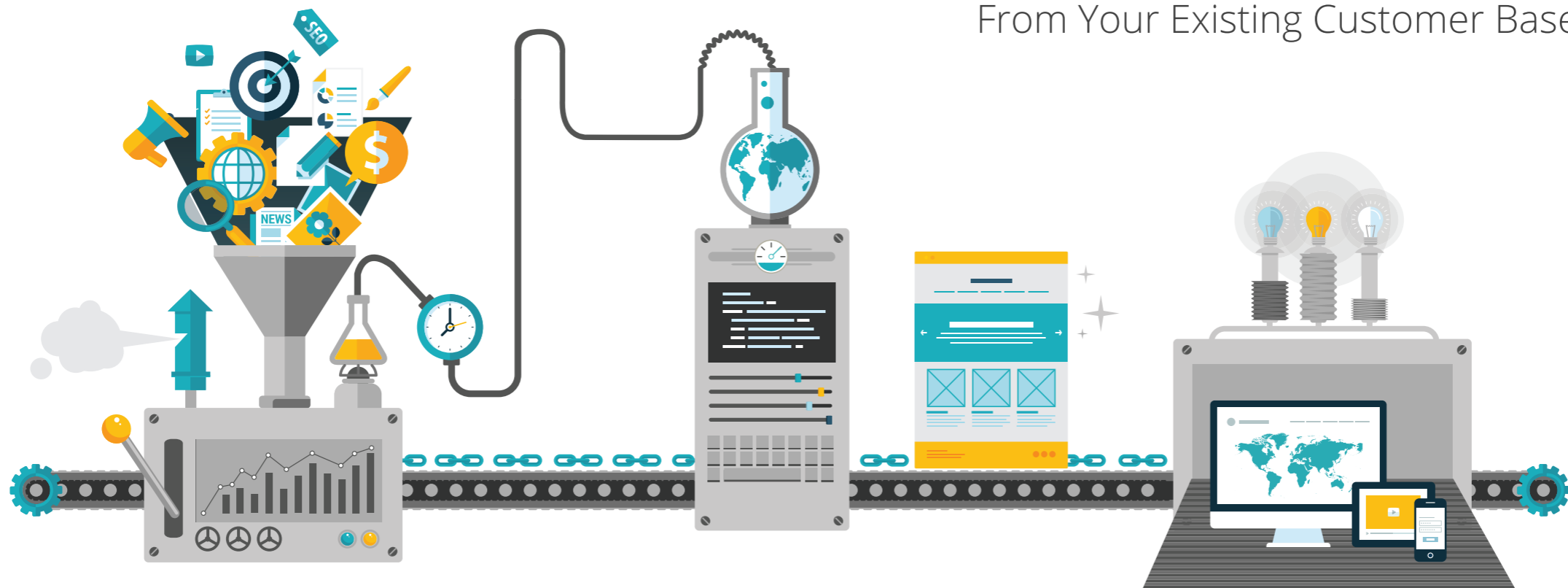
Greetings

Who's In The Audience

- SharpSpring Partner Agencies
- Agencies Considering SharpSpring
- In-House Marketing Professionals

Why Are We Here?

- Learning from Peers
 - Share marketing automation best practices
 - Provide real-world success stories
- Today's Case Study: Increasing Revenue From Your Existing Customer Base



Housekeeping

Questions?

- Phone lines are muted
- Submit via:
- Chat Box
- Twitter: #SharpTweet or @SharpSpring
- Answers at end of presentation

Webinar Recording & Slides

- Emailed after webinar

Webinar Survey

- We need your feedback

Upcoming Webinar:

Kick-Ass Content Marketing

December 17, 2015

11 a.m. - 12 p.m. EDT

8-9 a.m. PDT

4-5 p.m. BST



Lou Covey

Founder, President and CEO
Footwasher Media

Future Partner Presenters:

Email Aletha Royer at aletha@sharpspring.com

Introductions



Aletha Royer

DIRECTOR OF PARTNER ENABLEMENT | SharpSpring

Aletha comes to SharpSpring from one of our first agency partners. She grew a full-service digital marketing department with marketing automation and increased revenue over 50%.

Her passion is democratizing business by giving SMBs the same marketing automation opportunities as their larger counterparts.



Jose Romero

MARKETING COMMUNICATIONS MANAGER | Potratz

Jose manages marketing communications at Potratz, an automotive marketing agency in Schenectady, NY. He specializes in digital marketing, having done SEO, social, and inbound. In his current role, Jose is responsible for event promotion, product marketing and branding for Potratz and its clients.

Jose spends his spare time volunteering on a non-profit board as well as serving with other charities in the Albany area. He was a Big Brother for the Siena College Mentoring Program.

Poll

BUILD

YOUR BUSINESS WITH

LASTING CUSTOMER

RELATIONSHIPS

THE WINNING FORMULA FOR
REVENUE GROWTH



POTRATZ
JOSE ROMERO
MARKETING COMMUNICATIONS MANAGER

Overview

- Discuss client challenges
- Describe methods used to turnaround business
 - Key Takeaways

Sales increased 11% Q to Q
Service appointments increased 22%

Client Challenges



- Competitive area and low market penetration
- Struggled with service retention
- Repeat customers few and far between

THE WINNING FORMULA FOR
REVENUE GROWTH

JOSE ROMERO
POTRATZ PPADV.COM

Keys to Success



- Shifted focus from new customer to repeat business
- Implemented advanced segmentation
- Created automated campaigns to nurture both sales and service customers

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POTRATZ PPADV.COM

CRM Limitations

**New
Customers**



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Moving **Marketing Qualified Leads** to **Sales Qualified Leads**



Segmentation

Determine goals

- Increase sales
- Increase inventory
- Drive new service
- Increase customer retention

Set criteria

- Time since purchase
- Type of vehicle owned
- Purchase location
- Estimated mileage
- Time since last service

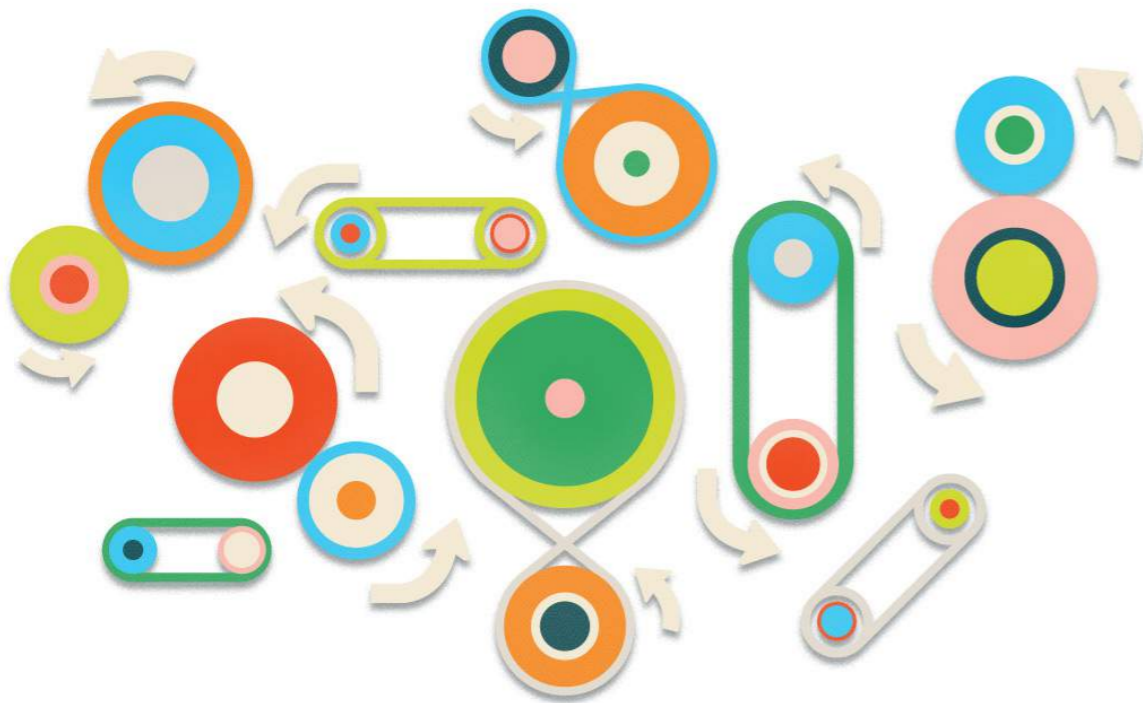
Break down even further

- New car sales
- Used sales
- Routine Service
- Major service
- Inventory needed

Prioritize

- Short-term goals
- Long-term goals
- Time wasters

Marketing Automation That Works



- Create automated rules to segment customers into different campaign buckets
- Develop long-term, personalized messaging that nurtures and attracts customers at several stages of the buying cycle
- Utilize free content, incentives, and offers relevant to each type of customer
- As customer grows and his/her needs change, reconnect with new strategies

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Building Effective Campaigns

Get The Most Value For Your Trade



7 STEPS
TO EASILY INCREASE
YOUR TRADE-IN VALUE

Download a **FREE** Trade-In Checklist to increase the value of your Trade-In Vehicle.

FREE

These Tips Will:

- Increase the value of your car when trading it in
- Pinpoint fixable issues to get the most for your trade
- Avoid common issues that will devalue your trade
- The best info you need before for trading in a car
- An **EXCLUSIVE** Bonus Voucher
- And so much more!

BONUS Download the **FREE** Trade-In Checklist Today and get an **Exclusive Bonus Voucher** to Get Even More for Your Trade!

What is your current car's make and model?

First Name *

Last Name *

City *

State *

Zip *

Download

Customer Visits
Page And Fills Out
Form



7 STEPS
TO EASILY INCREASE
YOUR TRADE-IN VALUE

FREE
CHECKLIST
DOWNLOAD

POTRATZ Motors

Have You Considered Trading In?

Your FREE Trade-in Checklist

Find Your FREE Voucher Inside the PDF Attached to this email.


Learn How To:

- + Increase the value of your car when trading it in.
- + Pinpoint fixable issues to get the most for your trade.
- + Avoid common issues that will devalue your trade.
- + The best info you need before trading in a car.

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31 Lafayette St. Schenectady, NY 12305

Send Resource

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Get Pre-Approved Today

Reduce your finance payments when you trade

Are you still interested in financing a new car? If so, you would be happy to know that you could reduce your monthly payments by [trading in your current vehicle](#). We offer full Kelley Blue Book value for vehicles in good condition.

If this is an option you would like to take advantage of, just fill out our [Trade form here](#) and see how much your vehicle is worth.


And if you don't have a car you would like to trade in but you are still considering financing a car, please give us a call at [866-340-7958](tel:866-340-7958) to schedule an appointment with our professional sales team.

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Follow-up

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Say Goodbye To All The Hassle

Shopping for a new or used vehicle can be a difficult process. You want to be sure that the dealership you're buying from offers only quality pre-owned vehicles. You also want to get the best possible price and financing/leasing options.

We offer a simple, no-hassle pre-approval process. If you're interested, visit our pre-approval page [here](#).

Stop in or [contact us](#) and we'll help put you in the right car today.

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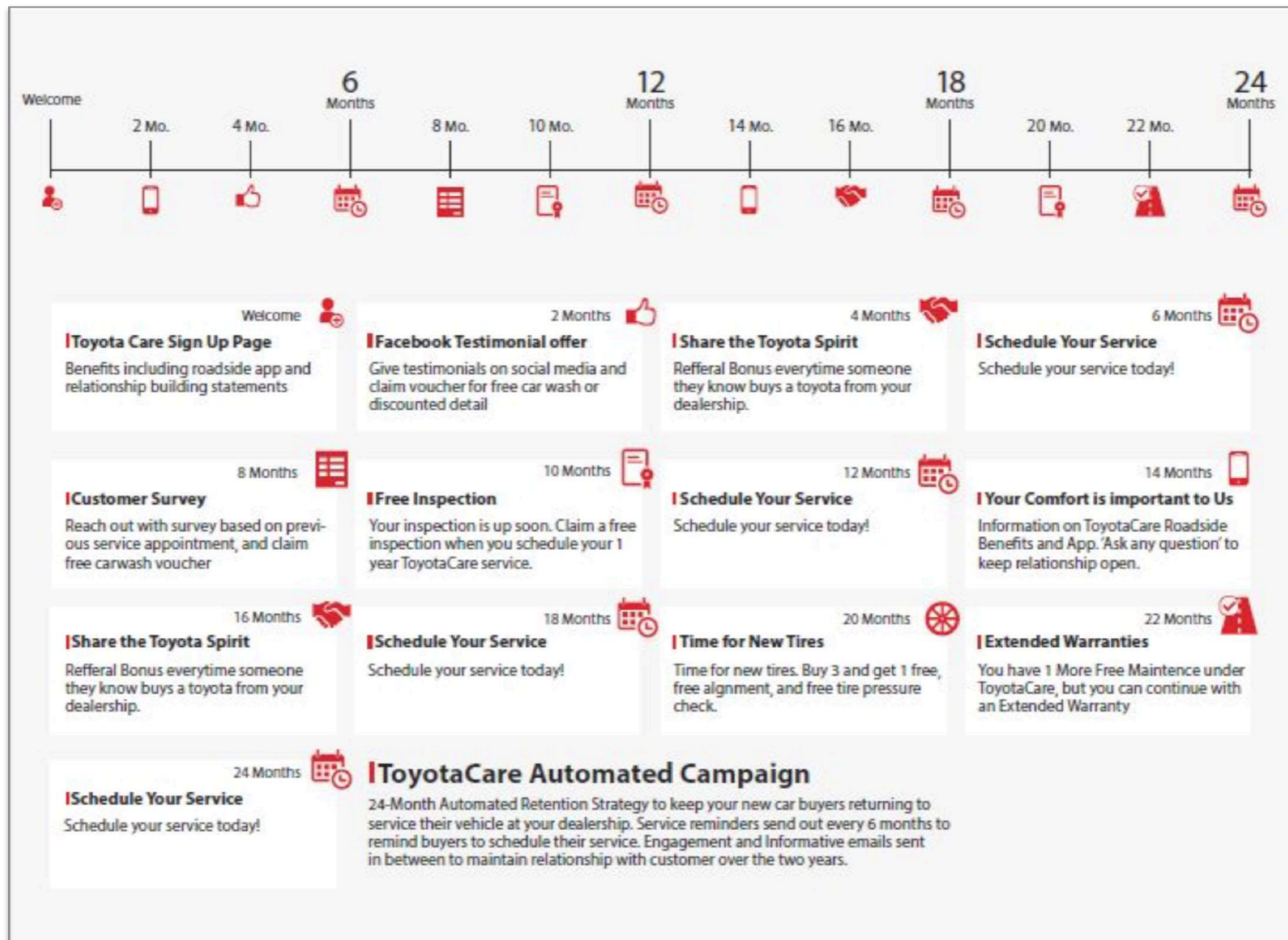
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Switch-up

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Creating Retention



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Customer Satisfaction

POTRATZ Motors We want to improve your experience. Take the survey.

Will You Help Us?

Take our Customer Satisfaction Survey

Your Feedback Is Important To Us

Hi {Firstname}

Getting right to the point, because we know your time is valuable. We continue offering the lowest prices possible and the best service in to asking for your feedback on a few questions to help us serve you bet


This survey will only take a few minutes. We appreciate your help and to providing you with the best possible experience.

[Take The Survey!](#)

Thank you in advance,

The POTRATZ Motors Team

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31 Lafayette St. Schenectady, NY 12305



Solicit Past Customers

Will You Help Us?

Our goal is to ensure we continue to offer the lowest prices possible for our vehicles and service of the vehicles. So we are reevaluating our marketing strategy and would like your help.

Will you help us by answering the following questions. It will take less than 2 minutes.

Name *

First Last

Email *

What are the Top 3 ways you watch television? *

Cable TV Satellite TV
 Netflix Amazon
 Hulu HBO GO
 Other

Do you watch the local morning news on TV? *

Yes, almost always Yes, occasionally
 Yes, but it's background noise No, I don't watch
 No, I get my news online

What is your preferred channel? *

NBC CBS
 FOX ABC
 Other

Do you listen to the local radio when driving? *

Yes
 No

Collect Data

THANK YOU

FOR HELPING US BE BETTER!

WE APPRECIATE YOUR HELP AND TIME

Thank Customer

POTRATZ Motors Thank you for completing our survey.

DOWN PAYMENT COUPON

\$500 Down Payment Assistance

\$250 Towards Your Down Payment

Not valid with any other offers. See dealer for details. Taxes extra. Must present coupon at time of service. Pricing could vary for some makes and models. Expires in 30 days.

Thank you for your completing our Customer Satisfaction Survey. As you requested, here is your \$500 Down Payment Assistance Coupon.

You can [shop our current inventory here](#) and when you've found the car you're looking for, just present this coupon at time of purchase.

And if you would like help with searching for a new vehicle, [please contact us here](#).

We look forward to hearing from you again.

The POTRATZ Motors Team

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Incentivize

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JOSE ROMERO

POTRATZ PPADV.COM

Results



- Increased sales 11% from 639 vehicles sold, to 709 vehicles from Q1 to Q2.
- Increased website traffic by 2009 visits
- Increased service appointments by 22% from 1470 to 1789

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REVENUE GROWTH

JOSE ROMERO
POTRATZ PPADV.COM

Continue The Conversation

With SharpSpring:

Questions?

Email sharpspring@sharpspring.com

Want to see more?

Request a demo on www.sharpspring.com

SharpSpring Partners:

Got a great success story?

Email ideas to aletha@sharpspring.com

With Jose:



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With Aletha:



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Questions?

Thank You.



SharpSpring