Agency Perspectives – Issue 12
February 2017

Your Secret Weapon for Getting New Clients

It’s about placing marketing automation right in their hands

Niall Durkan | President & Founder, Durkan Group

About the Author

Niall Durkan is the President and Founder of Durkan Group. Before open-source content management systems even existed, Niall was leveraging his experience in application development to craft custom web solutions. In 2003, he cut the corporate cord and started a full-service digital agency just outside of Philly.

During high school, a friend of mine worked at the local pet store selling puppies. Like at most pet stores, the puppies were popular, so he thought selling them would be easy. But he quickly learned – as he watched throngs of kids begging "Mom, pleeease" – that the moms said no. Out of desperation he changed one small part of his approach, and he quickly earned a new moniker: "The Closer." When a kid begged for a pup, my friend quietly lifted the puppy out of its crate and handed it to mom.

Game over.

Why did it work? Because there's a world of difference between looking at a puppy through a window and actually beginning to bond with that ball of energy in your hands.

"Handing Over the Puppy" to Prospective Clients

When we sell marketing automation as part of our full digital web offerings, we essentially do the same thing my friend did in the pet shop.

We lift the wall that divides the user from the product, and we allow them to get comfortable with the technology before buying it. But we do it in a way that feels familiar and comfortable, because we use the client's content and data during our pitch.

Most of our clients know something about marketing automation, so it's not a totally foreign concept, but they typically don't have first-hand knowledge. Just like with that puppy in the pet store, we take out the platform, show it off and then explain all the benefits. We demystify the technology and show the unmistakable truth for most companies: Marketing automation is too good to pass up.

I use our SharpSpring partnership as an added value in our service offerings, but I also rely heavily on the technology to prepare for my pitch meetings as well as to find prospective clients.

Since we are a full-service digital design agency, our main focus is building, hosting and designing amazing websites. Selling marketing automation is not our main focus, but it is very much part of our process. I use our SharpSpring partnership as an added value in our service offerings, but I also rely heavily on the technology to prepare for my pitch meetings as well as to find prospective clients.

In this article, I will walk you through how I *use* marketing automation to *sell* marketing automation. Whether you already have tons of clients on a platform or you're looking to convert your first, integrating marketing automation into your own strategy makes finding new clients, piquing their interest and getting them to say yes much easier.

FINDING THE CLIENT

When I see a company looking at us:

First, I find the client on Google. Then I take a look at what content they were viewing on our site as well as perform a review of their site.

Then I head over to LinkedIn to find the main contact for that company.

Last, I send a hand-written postcard offering our services.

Finding the Client

In the case I'll be presenting, I found the client via anonymous traffic. I regularly look at SharpSpring's VisitorID feature, which shows site visitor traffic, both known contacts and anonymous. In about 20% of the anonymous traffic, VisitorID is able to identify the company. This means I know the name of the company but not the individual.

When I see a company looking at us, I'll check them out on Google, take a look at what content they were viewing on our site, and then do a review of their site. If I notice their site could use a redesign, isn't mobile-friendly or is a bit dated in its layout, there's a good chance the person who was looking at our website is ready to use our services. I can confirm that when I look at the path they took through our site. Then I head over to LinkedIn to find the main contact for that company.

I'm a fan of the handwritten word. In this day and age, it's not often that you receive a handwritten note, let alone one that has been given some thought. I have nicely branded cards for the occasion, whether I'm writing to a cold lead or an existing client. In this case, I could have picked up the phone and made a cold call, as I did not have the contact's email, but instead I took the route of using a hand-written postcard. It's professional and yet still personal.

I wrote something like. *"I noticed that you or someone at your organization visited our website. We are a full-service digital agency right in Malvern.*

I believe we can elevate your company on the digital front. Feel feel to contact me to discuss." I put the postcard in an envelope, dropped a business card in with it, stamped it and addressed by hand. I use the (Malvern) location reference if it's a local company, which was the case here. Sometimes I'll reference specific things I noticed on their site or mention how we have worked in their industry, if applicable.

Getting Initial Buy-In

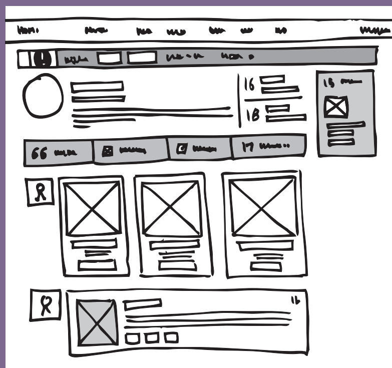
My postcard hit the right person, and a meeting was set up at our office. The first question out of his mouth: *"How did you know I was on your site?"* I anticipated this and had a quick demo ready to show off SharpSpring's VisitorID, being sure to mention that a bit of code does all the tracking. (I'll ask the client to plug this code in during a later demo, so it's good to educate early.)

I welcome this question because it's a great ice breaker. Before we knew it, the client was opening up, and my team and I were learning about his company and the areas in which we could help. It was quickly apparent that they needed us and that the company was ready to move forward. Next was a visit to the C-suite, so I had to prepare a pitch that would wow people at every level.

Personalizing Your Pitch

When prepping for this meeting, I incorporated the company's data, lingo, logo, prospects, etc., wherever I could in my pitch. The truth is, I could talk

PERSONALIZING YOUR PITCH



Forget the lorem ipsum and use the client content or something similar – they'll be more comfortable and open, and that will transfer over onto whatever you're pitching.

IT'S ALL ABOUT THE PREP WORK BEFORE THE MEETING

about the benefits of our company and marketing automation all day, but personalizing the pitch and the demo make the biggest impact.

I started to use this technique after reading *Rework* by Fried and Heinemeier, the founders of 37Signals, now Basecamp. One of the key lessons I took away from the book was the importance of framing your pitch (to the greatest extent you can) within a context that the potential client will understand. Forget the *lorem ipsum*. If the client identifies with the context you're presenting – because you're using their content or something similar – they'll be more comfortable and open, and that will transfer over onto whatever you're pitching. It's all about the prep work before the meeting.

Step 1: Set Up a Mock Instance

Before I meet with the client, I create an instance for their company in SharpSpring. This literally takes minutes and can be done a day or two before the meeting. After creating the instance, I send the tracking code to the client, explaining what the code will do and how it works. Then I ask the client to add the code to their site.

Within a few hours after adding the tracking code, I'm able to see who is visiting their site through VisitorID, and at a glance I can see some of the companies are legitimate prospects. It is a given that the companies listed in VisitorID are really only useful for B2B clients, which make up most of our client base.

Every client so far has understood that what I'm showing them is just the tip of the iceberg, and they usually stick around to see what more the technology can do for them.

At this point, it might seem like we are *giving away* that puppy – and the entire pet store – instead of just putting it into their hands. Yes, they aren't clients yet, but they're generally so impressed with our effort to set up an instance and show exactly what's offered, the risk that they'll take the information and run is minimal. Every client so far has understood that what I'm showing them is just the tip of the iceberg, and they usually stick around to see what more the technology can do for them.

Plus, I keep it very simple. For example, I don't integrate their forms. Although it's not difficult to do, it is a more involved process, so I keep that option in my back pocket in case we have another meeting and need to delve deeper. The first meeting is usually focused on the bigger benefits and not a lot of detail. This makes meeting prep quick and the presentation light and easy to digest.

Step 2: Load Contacts & Create Opportunities

Prior to the meeting, I created a sample spreadsheet to store contacts. It included columns for company, first name, last name, title and email, and 10 rows for the different contacts. I wanted to use real people, so I looked at some of the companies in the client's VisitorID and searched for employees of those companies on LinkedIn. I entered all column values for each of the 10 contacts, and then I simply guessed when it came to their emails (e.g., first initial + last name + @domain).

I started off by giving them a high-level explanation of marketing automation, and then I pulled up their mock instance in SharpSpring.

Next, I imported the contacts into SharpSpring. The nice thing here is that with some of the contacts, the import process was able to find their social profiles, so we had a face and social account links to go with the contact information. I then created opportunities in SharpSpring for five of the contacts. When it came to assigning each opportunity a name and a revenue amount, I just made educated guesses based on information from case studies on their websites. While we strive to be as accurate as possible to "speak the client's language," sometimes the details don't matter that much and our best guess is good enough.

Step 3: Set Up an Email

Then, I created an email that was tight, responsive and on point with the client's branding. The email was modeled to be an ideal follow-up email that the client could send to prospects after speaking with them on the phone. Since I had listed myself as a contact, I was able to send the email to myself, open it and click on the links to test everything.

Putting It All Together: Welcome to the C-Suite

Now it was time for my meeting with the execs. First, we discussed their website in detail regarding branding, design and functionality. The second step was to explain this "marketing automation" thing that they already knew they should be using but didn't really understand why or how.

Show the Interactions

I started off by giving them a high-level explanation of marketing automation, and then I pulled up their mock instance in SharpSpring. I went straight to VisitorID, where the execs were pleasantly surprised to see what companies were looking at their website. I showed them the nifty look-up feature that reveals specific key contacts from the companies visiting their site. (They loved that.) I briefly explained that a quick look on LinkedIn usually fills in any blanks, such as contact information, as well as provides a way to directly contact that person, if needed.

Execs were pleasantly surprised to see what companies were looking at their website.

VISITOR ID

Then we delved into the “Life of the Lead” feature. I explained that if someone clicks on a link in an email or fills out a form on the site, that person will become a “known contact.” To show them what that looked like, I used myself, because I had already visited the site and clicked on the email links from earlier.

LIFE OF THE LEAD

I also clicked on three other random visitors with company info to look at their journeys through Life of the Lead. We could easily see one visitor was looking for a job, as he was spending his time primarily on the careers page. The other two were more clearly interested in the product, having each spent more than five minutes looking through product demonstration videos, case studies and product pages.

As I watched their interest increasing, I asked the execs, “Can you imagine how this VisitorID lights up with known contacts after you send an email to one of your lists? Better yet, when one of them comes back to your site 10 or 20 or 40 days later, you will know, and you’ll be able to see their intent through their behavior!”

Demo the CRM & Email Capabilities

I showed them the sample follow-up email I had designed, and we discussed the differences between “one-off” smart emails and emails meant to be sent to a larger audience. Through conversation, we identified which email templates and workflows would be applicable to different scenarios in their business.

I also showed them the sample sales pipeline, which was populated with opportunities. They all got a kick out of one opportunity I had created with an amusing title and outrageous potential revenue. The other opportunities turned out to be relatively in line with what the company normally encountered, which left me pleasantly surprised at my guesswork.

This particular client was unhappy with its current CRM and really liked what I showed in the demo. Obviously this varies from prospect to prospect, and you will find others who just want marketing automation integrated with their existing CRM.

Cover All the Other Stuff

It is a given that the demo described above only scratches the surface of what can be done with marketing automation. I wanted to be sure the execs had at least a basic understanding of its other capabilities, so I discussed the following as well:

- **Site & Adwords Analytics:** I mentioned that these are integrated and easily accessible via the marketing automation platform.
- **Lead Scoring:** By simply pulling up the configuration settings, I was able to give the execs a solid understanding of how it worked and how it could be customized both to their business and to their users' behaviors.
- **Tasks & Workflows:** We discussed how drip campaigns work and how to set up a solid workflow. I explained that while this requires more effort up front, it offers tremendous value over time, as it runs on its own and provides users with a great experience while further solidifying the brand.
- **Lists:** I showed them the importance of lists, especially dynamic ones based on user behavior. One asked: "Wow, so I can always have an up-to-date list of known contacts that visited news and product pages for a specific product line?" My answer was, "Why yes you can, and here is how!"

SharpSpring provides a great platform, and we provide the hustle and know-how as well as other related services our customers need, like web development and hosting support.

It's in the Bag...

After demonstrating these marketing automation capabilities using the client's data, it was no longer a question of "Do we need this?" but rather "We have to have this! What are the next steps?"

They could clearly understand that it wasn't just the tool that was impressive. My company was just as impressive, because we were able to understand their business and quickly implement a technology platform that had a meaningful return.

This example is a strong reflection of our partnership with SharpSpring. We landed the client, and it was easier to do as a result of the partnership. SharpSpring provides a great platform, and we provide the hustle and know-how as well as other related services our customers need, like web development and hosting support.

This approach may not be the end-all, but it has proven very effective for us time and time again. Multiple factors have contributed to our growth, but marketing automation has certainly been one of them, providing us with the ability to automate our processes and more effectively manage our sales pipeline. Since we started using SharpSpring, we've seen some great results:

- Our monthly recurring revenue has increased by **over 30%**.
- In our first full year of using SharpSpring, our revenue increased by **over 28%**.

Remember, the example I gave all started with a reach-out to a cold prospect, using snail mail. It's a small effort for a big reward. Now imagine how easy and effective it would be to use the same approach for existing clients.

My advice to other agencies looking to leverage marketing automation for their clients is twofold:

1. Use marketing automation for your own efforts. Become very comfortable with the platform and understand it from a user perspective before presenting it to your clients. This proves you walk the walk and talk the talk. If you are comfortable with the technology, your clients will be as well.

2. Create all examples, emails, presentations, etc., using the client's data, and be sure to do the research and use general business sense when filling in any gaps in the information. This makes your presentation relatable and places everything in a more familiar context for your clients, so they can focus on understanding how marketing automation and your services will really benefit them.

Make no mistake, every pitch we give is first about what we do best – branding, building and designing websites. Then, we insert the marketing automation component to bolster our offering and smooth out the process. It may sound like a big effort to prep for this part of the presentation, but it's not. At most, it might take an additional hour or two, but you'll discover it's well worth it. Putting in that extra effort is something that many other companies aren't doing, and it's what will set you apart from the rest.

SharpSpring

SharpSpring is the marketing automation platform of choice for more than 1,000 digital marketing agencies and their 5,000+ clients. Since 2014, SharpSpring has provided its powerful marketing automation solution to businesses around the globe. In the short time since its inception, the company has gained significant market share from industry leaders with its competitive pricing, agency-focused business model, and robust platform.

Visit www.sharpspring.com for more information.

Durkan Group

We are a full-service digital agency just outside of Philly. Crafting connected experiences that delight users and elevate brands is what keeps our hearts pumping every single day. When designing and developing the digital experiences that help brands thrive, there's never a moment we're not always-on. We are client-focused, creatively inspired and results driven. And we'll prove it.

Visit us at www.DurkanGroup.com