



Powerful. Affordable.  
Marketing Automation.

# Your Secret Weapon for Getting New Clients

Place Marketing Automation in Their Hands



**Bryan Tobin**

Usability Manager | SharpSpring



**Niall Durkan**

President and Founder | Durkan Group

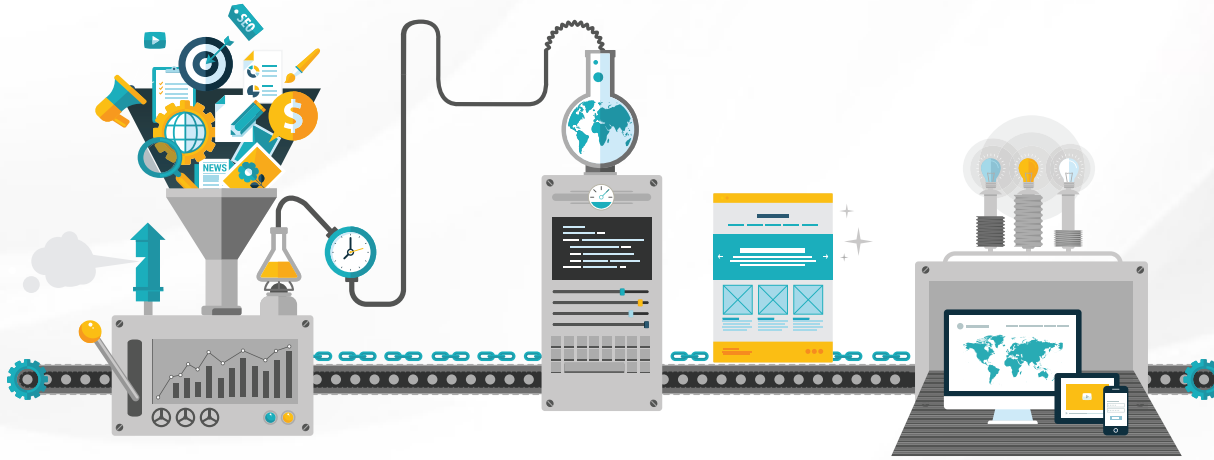
# Greetings

## Who's In The Audience

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

## Why Are We Here?

- Learn how to make MA part of your pitch
  - Share marketing best practices
  - Provide real-world stories



# Housekeeping

## Questions?

- Phone lines are muted
- Submit via:
  - Chat Box
  - Twitter: #SharpTweet or @SharpSpring

## Webinar Recording & Slides

- Emailed after webinar

## Webinar Survey

- We need your feedback

## Upcoming SpringBoard Live – Partners Only:

Tools of the Trade: Review Your Agency's Toolbox

Friday, May 12, 2017

## Upcoming Webinar:

The State of Marketing Automation: Ascend2

Wednesday, May 17, 2017

## Future Partner Presenters:

Email Koertni Adams at  
koertni.adams@sharpspring.com



#SharpTweet live with us

# Introductions



## Bryan Tobin

**Usability Manager | SharpSpring**

As Usability Manager, Bryan is responsible for creating content to help users get the most out of SharpSpring. This includes maintaining the support forum and creating instructional “how to” videos. Working in collaboration with Marketing, Support, and Development, Bryan helps create an exemplary experience for every user.



## Niall Durkan

**President and Founder | 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.



#SharpTweet live with us



# Your Secret Weapon for Getting New Clients

Wednesday May 10th, 2017



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**We are Durkan Group**



**Disclaimer - This is one of my designers looking at this presentation**





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# Survey



**D**

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**Hand over the puppy!**



**Lorem Ipsum is not your friend! Getting Real. You make it real.**

Everybody's talking in  
words I don't  
understand..

You got to be the only  
one, who knows just  
who I am..

## How the opportunity came to be, enter...

### VISITOR ID



### Our drip campaign for handling anonymous leads:

1. Send contact(s) a handwritten card.
2. 1 week later send an email.
3. 1 week later call.



*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 handwritten postcard offering our services.*

## Step 1 - Setup the Instance

- Takes very little effort.
- Assumes prospect can easily get the code on their site.
- After they do, start watching the traffic flow and see what companies are viewing their site.
- I don't bother integrating forms, this could end up being a temporary instance.

## Create New Client

### Select Product

SharpSpring Marketing Automation

SharpSpring Mail+

*Note: Contact plans only.*

### General Information

Full Name

Email

Company Name

Website

### Address

Country \*

Street Address \*

City \*

State/Province \*

Zip \*

## Step 2 - Load Contacts & Create Opportunities

- Start with a spreadsheet w/ First Name, Last Name, Company, Title & Email
- Include yourself as a contact
- Make up others via companies you see in VisitorID, existing clients, etc.
- Make up opportunities to load the pipeline



### Step 3 - Setup an Email

- Create a nice email w/ client branding
- I made mine as a followup to conversation scenario and embedded links
- Send it to yourself, open and click away so you can show client what a known lead looks like, life of lead, etc.



### Time for the Meeting!

- We spent some time discussing branding and redesign before explaining marketing automation and going into demo.
- I went straight into VisitorID, explaining it using rough percentages. From there into lots of different features.
- Putting everything in their context made it resonate.
- “Well this is already setup, a lot of the work is done!”





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Making the commitment







# Thank You



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# Poll

 #SharpTweet live with us

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# Questions?

 #SharpTweet live with us

 SharpSpring

# Continue The Conversation

With Niall:



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