Demo Outline 54 minutes

SharpSpring

> *Have all the tabs necessary to conduct a demo open, including but not limited to:*
> - **Form "Workshop":** sharpspring.com/example-form
> - **V-ID Email:** https://app.sharpspring.com/emails/webProspector

1 PROSPECT COMPANY OVERVIEW   5 MINUTES

- a Typical Customer B2B/B2C
- b Familiarity with Marketing Automation (M.A.)

2 FOCUSED ON MAKING YOU SUCCESSFUL   5 MINUTES

- a We provide our partners free, unlimited support with a dedicated account manager.
- b Super flexible architecture works with what you already use.
  - i   5-minute setup
  - ii   We work with any CMS (unlike Hubspot and others)
  - iii We work with other CRMS (unlike Infusionsoft)
  - iv   We work with all kinds of forms like Gravity, Formstack and Woofoo

Slow down and explain these points!

3 BEST UI AND EASIEST-TO-USE INTERFACE   5 MINUTES

- a It is widely acknowledged that we have the easiest-to-use app on the market. Let me prove that:
  - i   SpringBoard Contextual Help
  - ii   Over 70 built-in videos and page overlays on every page
  - iii "New+" button is all you need to know to begin using SharpSpring

4 CONTENT   7 MINUTES

- a Dynamic Forms
  - i   Support custom fields (radio buttons, dropdown lists, check boxes, etc.)
  - ii   Drag & drop form creation and editing
  - iii Forms take on the look and feel of your site by using your CSS
- a Email Templates
  - i   Dozens of responsive templates to use so they look great on phones and tablets
  - ii   Add your own templates - as a creative marketing agency, you are not stuck with ours
  - iii SMTP delivery platform means your emails will get to the right inbox every time
- c Real-time Drag & Drop WYSIWYG Email Editor
  - i   Stress real-time, and quick show and graphic being swapped and resized (consider skipping if CEO or non-designer is on the demo)

5 VISITOR ID   5 MINUTES

- b Does what it sounds like - Identifies visitors to client's website.

     i   There are two kinds of visitors - the ones you are already know and are engaged with, and the anonymous visitors.

        1   Anonymous Visitors - It turns out that only 2% of visitors to a typical B2B website fill out a form.   That means 98% of the traffic is wasted.

            - Visitor ID identifies them.
            - Provides search terms, page visits, so you know what they are interested in.
            - Provides names phone numbers and emails.

        2   For known visitors, Visitor Id provides the sales team with critical business intelligence to help the close the deal.

            What the leads currently in their pipeline want, and how interested they are.

        3   Put your agencies brand in front of your client every day with Rebrandable Visitor ID daily email.

        4   All of the information is "Actionable data".   Search terms, page visits, referring website, campaigns that brought them.

6 · LEAD SCORING — 3 MINUTES

  a Four parts and each is totally customizable based on your client's sales process.

     i   Completeness - What information do you have about the lead?
     ii   Engagement - web visits, specific pages, forms filled out, webinars attended, white papers downloaded Fit.
     iii   Are they a business of a certain size, or geography, or type?

7 · AUTOMATION — 10 MINUTES

  a The purpose of automation is to drive revenue by allowing you to treat every lead as an individual.   Give leads the info they want, and notify sales when leads do something important.

     i   Workflows are a series of actions that take place overtime.
     ii   Automation task consists of trigger(s), filter(s), and workflow(s).
     iii   Dynamic lists - segment customers.

8 · BRING IT ALL TOGETHER WITH THE MAGIC TRICK — 5 MINUTES

  a Lessons

     i   Pick-a-card email sent automatically
     ii   Tracked web visit on Life of a Lead
     iii   Sends you exactly what you wanted - not a deck of 52 cards, but your card
     iv   Sales rep ("I") gets a notification
     v   Lead score increased
     vi   Added to dynamic list

9 · WORKING WITH SHARPSPRING — 3 MINUTES

  a Easy to work with

     i   Dedicated Account Manager
     ii   No Monthly Contract

10 · WORKING WITH SHARPSPRING — 3 MINUTES

  a Multi-client edition easily added and manage your clients with single sign-on.
  b No need to call us to add clients.
  c You are not a reseller. This is your platform, and your customers are yours.
  d Charge them whatever you like, or not at all.
  e No long term contracts.

11 · NEXT STEPS CALL TO ACTION — 4 MINUTES

  a Where do we go from here? Should we set a second meeting with others? Next steps.
  b Don't leave without establishing a plan of action.