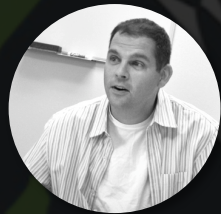




# Building Lasting Relationships In Complex Sales Cycles

Long-term Lead Nurturing: Going Beyond RFPs



**Rick Carlson**

President & Founder  
SharpSpring



**Perryn Olson**

President  
The Brand Constructors

# Introductions



## Rick Carlson

PRESIDENT/FOUNDER **SharpSpring**

Rick is a founder and president of SharpSpring, which he started with the goal of bringing marketing analytics and automation tools to small and medium businesses on an affordable and easy-to-use SaaS platform.

Rick has 17 years of executive management experience in the technology sector, holding president, CEO, general manager, and board positions at several successful Internet security companies.



## Perryn Olson

President **The Brand Constructors**

Perryn Olson is the president of The Brand Constructors, a construction brand marketing & design firm that increases hit rates and profitability for construction companies and engineering firms. Perryn regularly contributes to build-industry publications, speaks at conferences, and is a certified marketer within the build industry. He also published his first book, Construction Executive's Guide to Brand Marketing, last year.

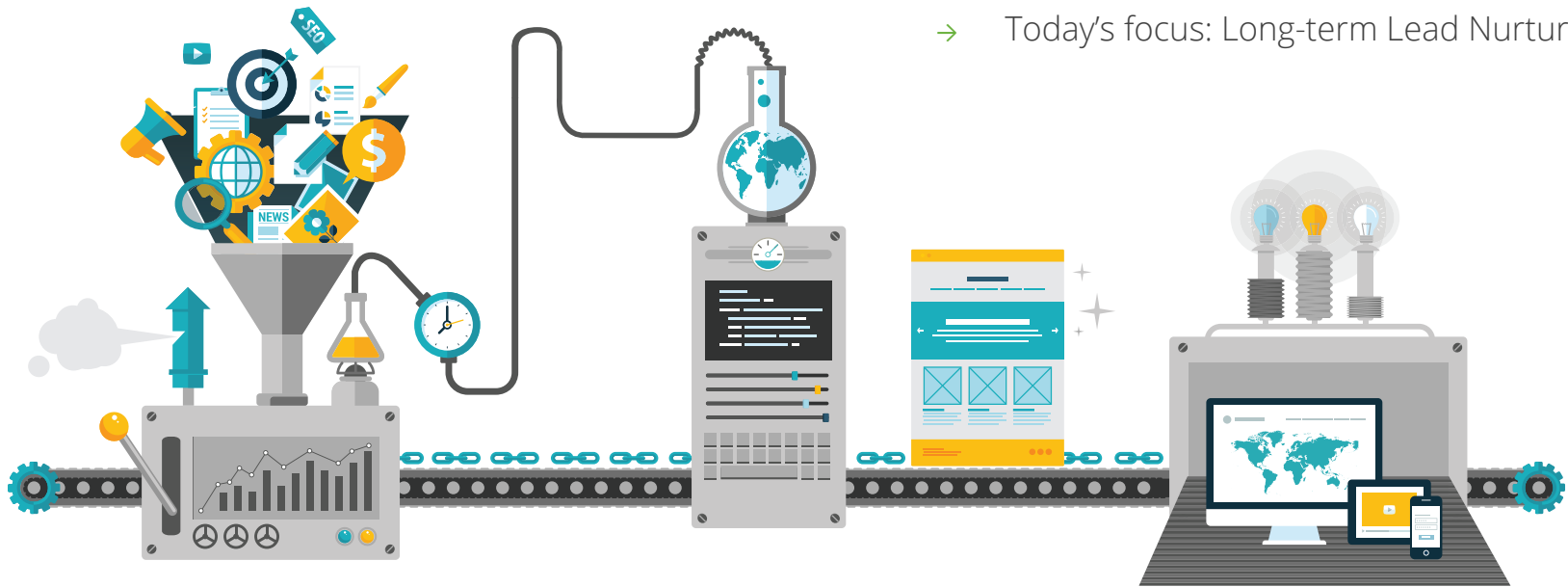
# Greetings

## Who's In The Audience

- SharpSpring Partner Agencies
- Agencies Considering SharpSpring

## Why Are We Here?

- Learning from Peers
  - Share marketing automation best practices
  - Provide real-world success stories
- Today's focus: Long-term Lead Nurturing



# 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 Webinars:

### SpringBoard Live (partners only)

- Friday, August 7th (1<sup>st</sup> and 3<sup>rd</sup> Fridays)
- 11 am-11:30 am EDT

### The Marketing Automation Leap

- Wednesday, August 12th, 2015
- 11 am-12 pm EDT | 8-9 am PDT | 4-5 pm BST



Robin Danek  
President  
Chief Internet Marketer



## Future Partner Presenters:

Email Aletha Royer at [aletha@sharpspring.com](mailto:aletha@sharpspring.com)

# Featured Speaker



## Perryn Olson

President

**The Brand Constructors**

**THE BRAND  
CONSTRUCTORS**

- President of The Brand Constructors
- Author of Construction Executive's Guide to Brand Marketing
- Certified Marketer within the building industry
- Eagle Scout, Loyola University New Orleans graduate





What is Marketing Automation?



**Marketing automation** refers to software platforms and technologies designed for **marketing** departments and organizations to more effectively market on multiple channels online (such as email, social media, websites, etc.) and **automate** repetitive tasks.

[Marketing automation - Wikipedia, the free encyclopedia](https://en.wikipedia.org/wiki/Marketing_automation)

[https://en.wikipedia.org/wiki/Marketing\\_automation](https://en.wikipedia.org/wiki/Marketing_automation) Wikipedia ▾



**Automate redundant tasks** like follow up (drip marketing)

**Identify new prospects** on your website

**Focus on HOT prospects** that are ready to buy

**Cross-sell** clients based on their **behaviors**

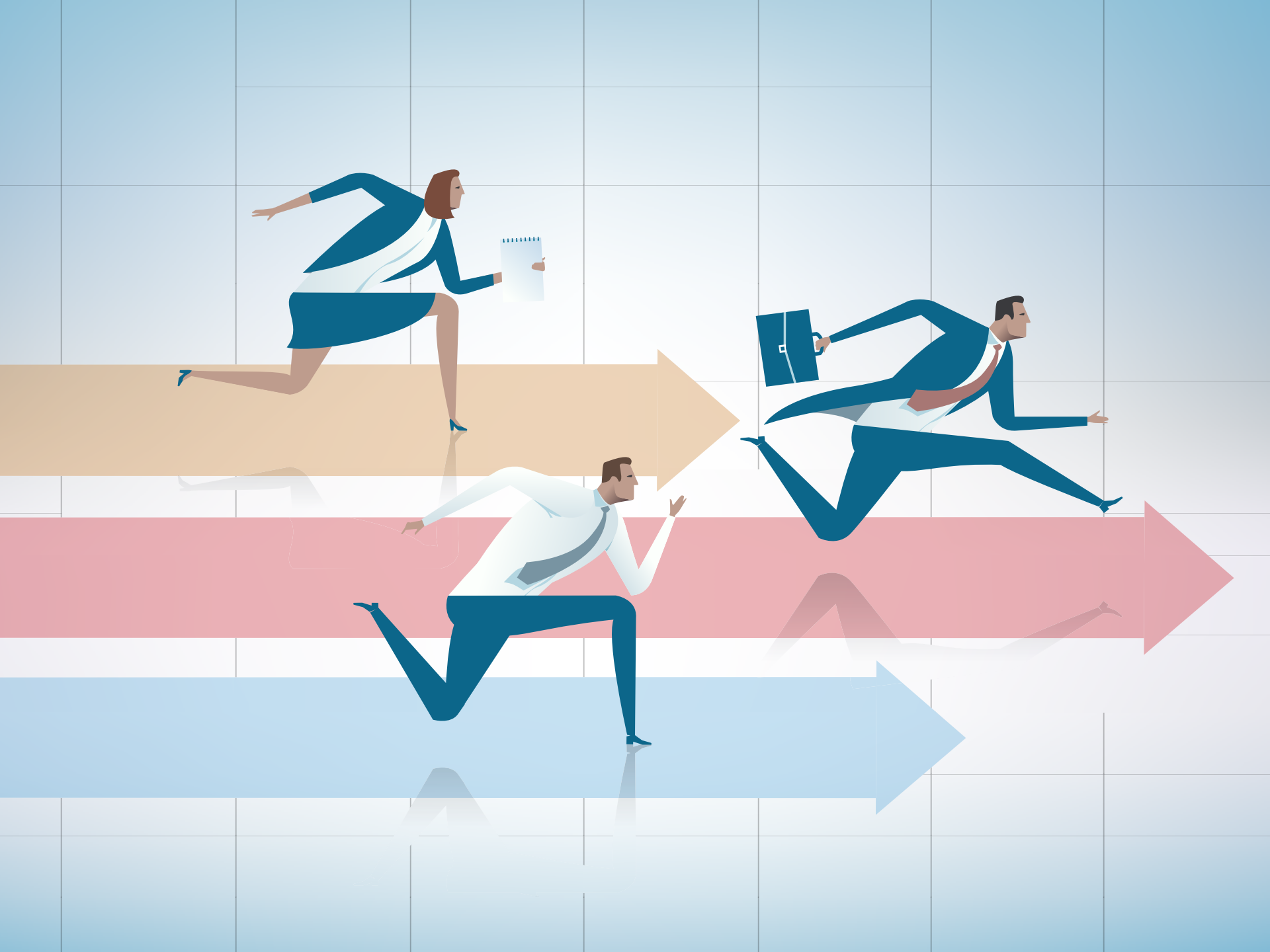
**Track marketing efforts** in real time

Move prospects through sales pipeline **faster**

**Forecasts revenue** coming into the firm

**Alert** you when a cold prospect returns to your website

You can even see the **competition spying** on you







# Without Marketing Automation?

**Day 1**

Visits website, looks at 6 pages,  
downloads a white paper, leaves website

# With Marketing Automation?

## Day 1

Visits website, looks at 6 pages,  
downloads a white paper, leaves website

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- **Website** – Sends email
- **System** – Scores the visitor
- **System** – Contacts business developer
- **System** – Tracks ROI
- **System** – Adds visitor list



# With Marketing Automation?

Day 1

Week 1

Website automatically sends a personalized follow up email from the business developer asking for feedback on the white paper

---

- **System** – Increases lead score based on behavior
- **System** – Notifies business developer that lead surpassed 50 points
- **Bus. Dev.** – Send LinkedIn invitation
- **Prospect** – Accepts invitation
- **System** – Increases lead score based on behavior

# With Marketing Automation?

Day 1

Prospect receives company's email newsletter with personalized content based on job title. Prospect clicks on link on their smartphone.

Week 1

**Week 2**

- 
- **System** – Increases lead score based on behavior
  - **System** – Tracks new device

# With Marketing Automation?

Day 1

System automatically sends follow up email with suggested white papers, which the prospect clicks.

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Week 1

Week 2

**Week 4**

- **System** – Sends the email
- **System** – Scores the visitor based on behavior
- **System** – Add prospect to new mailing list
- **System** – Contacts business developer that lead now has 100+ points
- **Bus. Dev.** – Reaches out to hot prospect to schedule a call

# With Marketing Automation?

Day 1

Prospect & business developer meet

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Week 1

- **Bus. Dev.** – Creates an Opportunity

Week 2

- **System** – Tracks the Opportunity's progress, provides real time revenue forecast

Week 4

- **System** – Tracks ROI of campaign

**Week 6**

- **System** – Sends a prescheduled, prewritten email
- **Bus. Dev.** – Adds an alert to text/email him

# With Marketing Automation?

Day 1

Prospect returns to the website to research info to create an RFP and sees a different call to action.

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Week 1

- **System** – Shows a new call to action based on lead score and key factors

Week 2

- **System** – Texts business developer

Week 4

- **Bus. Dev.** – Calls prospects “serendipitously”

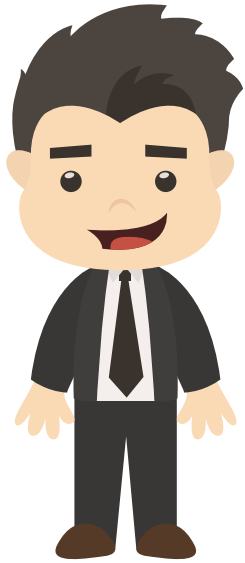
Week 6

- **Bus. Dev.** – Suggests unique option based on prospect’s website history

**Week 10**

- **Prospect** – Becomes a client without an RFP because this company “gets her” and she doesn’t want to work with anyone else

# With Marketing Automation?



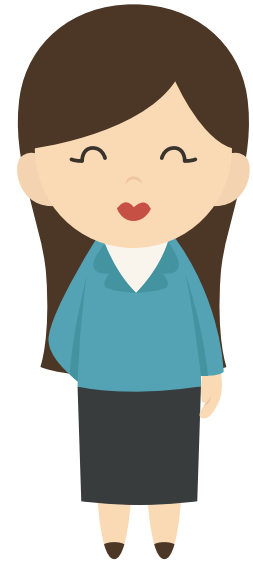
Business Developer



Marketer



Boss



New Client



- Tracks Engagement
- Scores Lead
- Tracks Opportunity
- Forecasts
- Drips Marketing
- Informs Business Developer

✓ **Automate redundant tasks** like follow up (drip marketing)

✓ **Identify new prospects** on your website

✓ **Focus on HOT prospects** that are ready to buy

✓ **Cross-sell** clients based on their **behaviors**

✓ **Track marketing efforts** in real time

✓ Move prospects through sales pipeline **faster**

✓ **Forecasts revenue** coming into the firm

✓ **Alert** you when a cold prospect returns to your website

✗ You can even see the **competition spying** on you







## Automation



The Brand Constructors



## Automation Tasks

Filter Rules

## MOST ACTIVE

- 50+ Lead Score
- Change Industry to Con...
- Change Vice President t...
- Construction Marketing...
- Contact Form - Add to List
- Downloads a Whitepaper
- Flash website list
- Form Submit Notification
- LinkedIn Connection
- Newsletter - Add to list
- Webinar Lead Score

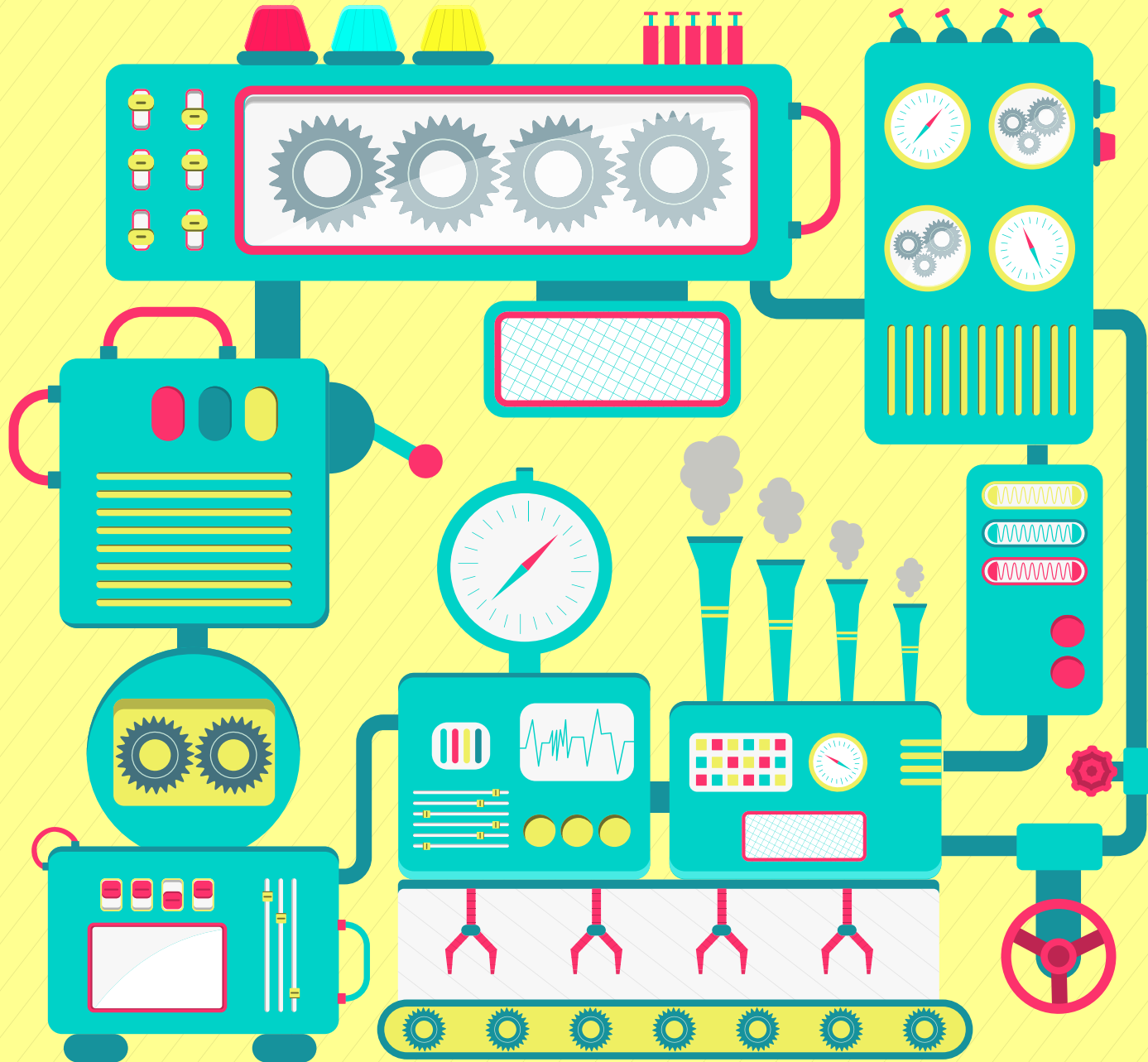
+ Add New Task

1. just after start send the email "SharpSpring Intro to Clients".
2. 1 week after start, or during next available business hours, send the email "SharpSpring Video Link".
3. 2 weeks after start, or during next available business hours, send the email "Jan 9, 2015 - It's 2015, Ready or Not!".
4. 2 weeks after start send invitation to linkedin from user **Perryn Olson**
5. 4 weeks after start, or during next available business hours, send the email "SharpSpring Intro to Clients".
6. 1 month 1 week 5 days after start send a notification to **Lead Owner** when available, otherwise send to via email.
7. 1 month 3 weeks 5 days after start, or during next available business hours, send the email "SharpSpring Video Link".
8. 2 months after start add to list **Contacts**

Save Changes

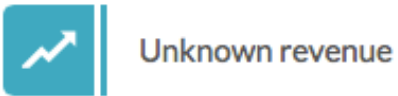
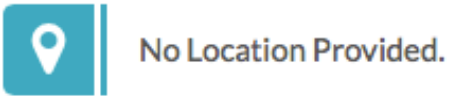








Get Contacts



1 Visit 1 Important Page

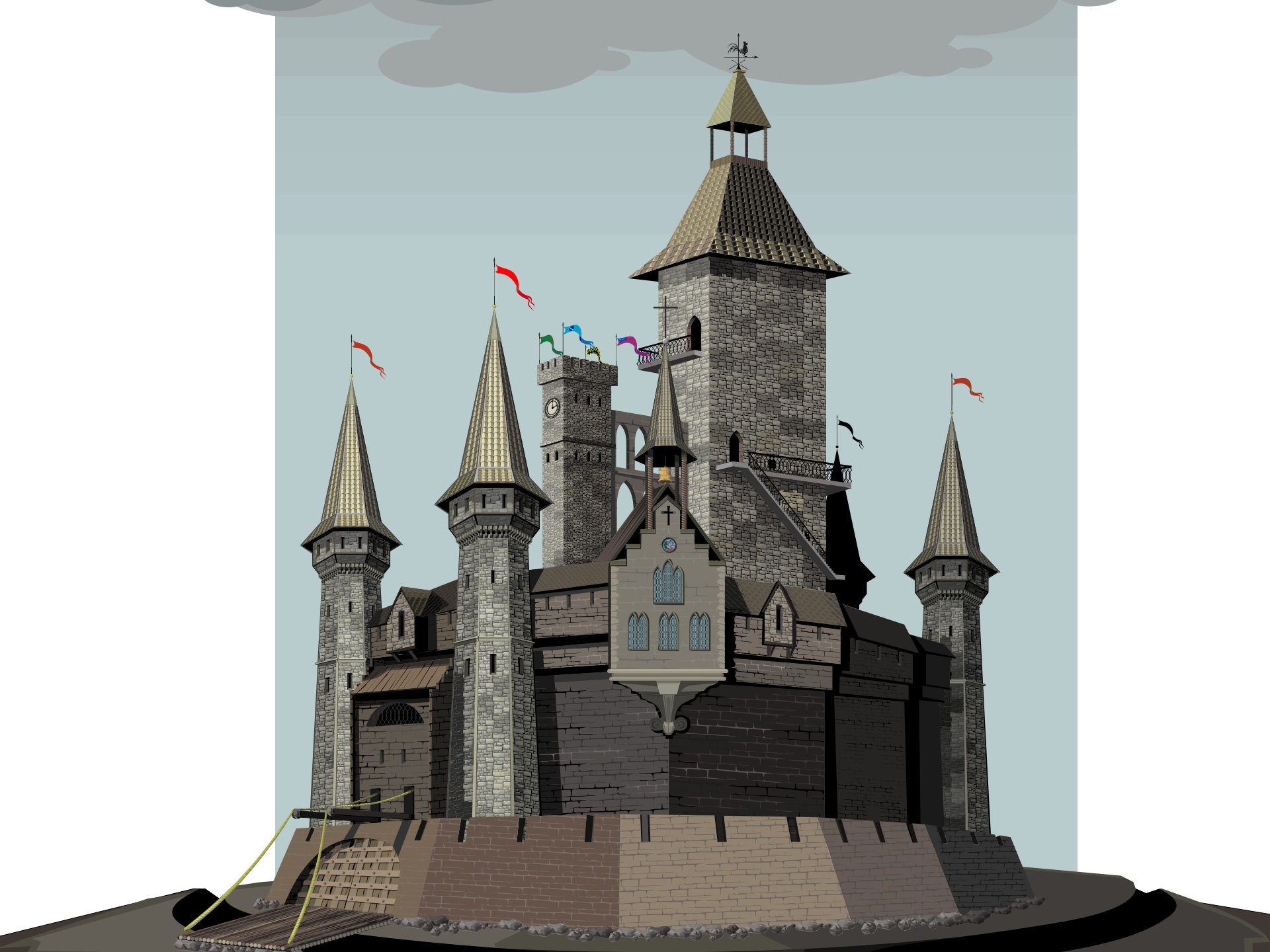
Industry:

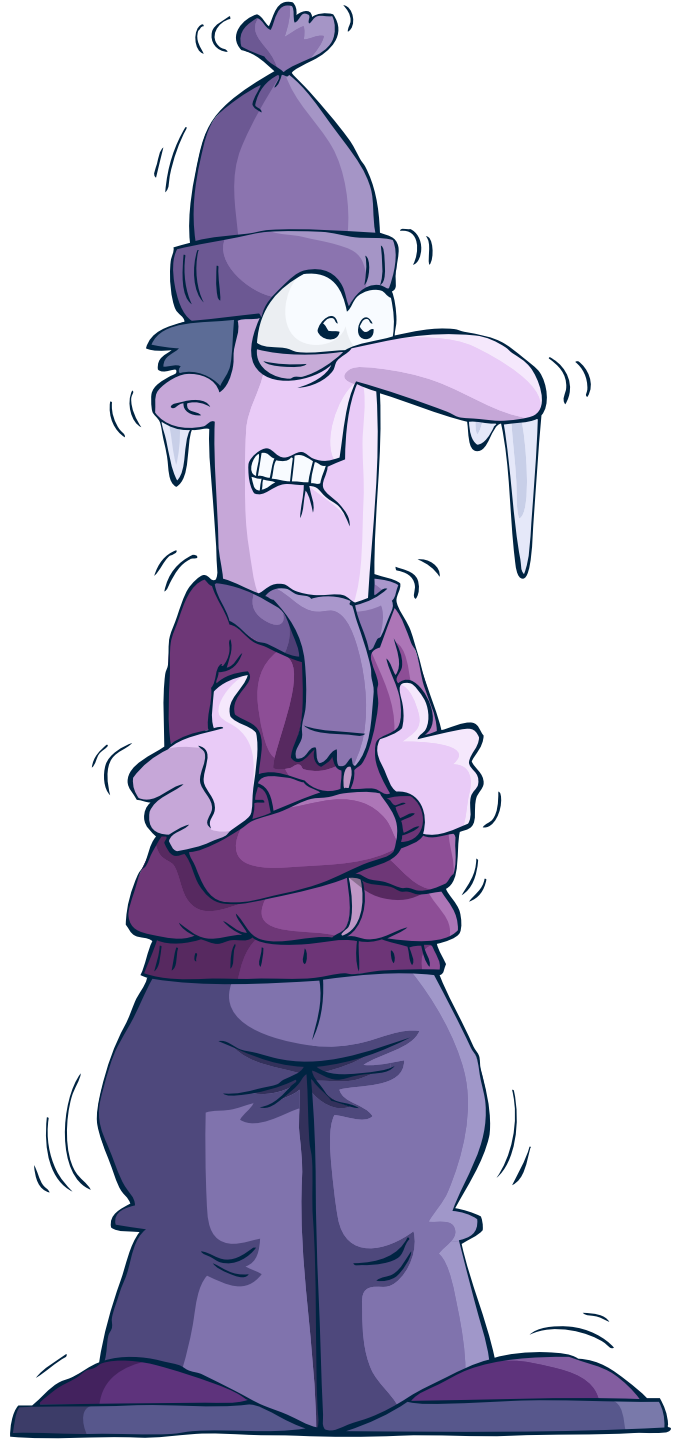
Visit to [www.](#)

July 7th at 9:34 am

[/contact\\_us](#)



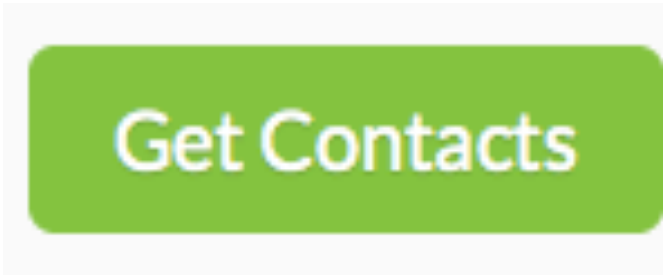








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# Continue The Conversation

## With SharpSpring:

Questions?

Email [sharpspring@sharpspring.com](mailto:sharpspring@sharpspring.com)

Want to see more?

Request a demo on [www.sharpspring.com](http://www.sharpspring.com)

## SharpSpring Partners:

Got a great success story?

Email ideas to [aletha@sharpspring.com](mailto:aletha@sharpspring.com)

## With Perryn:



**THE BRAND  
CONSTRUCTORS**

## Perryn Olson

President

**The Brand Constructors**

**Phone** 504-355-4119

**Email** [p@brandconstructors.com](mailto:p@brandconstructors.com)

**Web** [www.brandconstructors.com](http://www.brandconstructors.com)

**Twitter** @brandconstruct

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# Thank you!

Questions?

