**The Inbound Marketing Assessment Play Book -For VAR’s**

**Goal of the Call:**

This stage of the sales process is a qualification/discovery call designed to uncover the following with your prospect:

* **BANT/3C** (concept of a conversion, capacity to create content internally, commitment)
  + **B**udget

***Important Note:*** The IMA is a *CONVERSATION* not an interrogation. While this tool contains mostly questions, the intention is to facilitate a CONVERSATION about a prospect’s business.

* + **A**uthority
  + **N**eed
  + **T**iming
* **GPCT**
  + **G**oal

***Important Note:*** There are a few must haves:

* Do they have control of their website – what is it built on?
* Do they have a CRM?
* How many contact do they have whom they typically market to?
  + **P**lan
  + **C**hallenge
  + **T**imeline

**IMA Call Outline:**

* Build Rapport – Get the prospect at ease, start to build trust.
* Set the Agenda – Establish exactly what will take place during the call.
* Warm Up/Big Picture – Get prospect talking about their business.
* Explore Prospect Goals – What is this business setting out to accomplish?
* Understand Current Plans – What plans are in place to get there?
* Uncover challenges – What stands in their way to hitting their goals?
* Establish Timelines – How soon do they need to execute to hit their goals?
* Expose Consequences and Implications – What if they hit? What if they miss?
* Verify Budget and Authority – Can they afford it? Can they make a purchase decision?
* Close for Next Steps – Diagnostic call or free resources

***Important Note:*** Provide specific tips over the course of the call to demonstrate knowledge, build credibility and gain trust to allow you to dig deeper into your prospect’s business.

**IMA Prep and Set Up:**

1. Create a trial portal and populate it with least 5 competitors. Try to get at least 3 from the prospect. Source the other 2-3 by searching your prospect’s most important keywords on Google. Find those companies that show up on the 1st page. Ensure at least one competitor has stats better than the prospect. If prospect does not provide competitors, find all six.
2. Identify the “tips” you may use over the course of the call to establish and maintain trusted advisor:
   1. Poorly written or missing title tags
   2. URL’s without keywords
   3. Missing or ineffective calls to action
   4. Presence or lack of conversion forms, etc…
   5. No presence in social media
   6. Blog hosted on Blogspot, Wordpress, Typepad, etc…
3. Confirm the call by sending an Outlook Calendar update before the call.
4. Prepare your strategy for the call anticipating opportunities and objections
5. Make a preliminary BANT assessment based on your prospect’s site.
6. Open a web browser with 2 tabs open:
   1. Tab One – set to your prospect’s home page
   2. Tab Two – set to the Competitors Report in your prospect’s portal
7. Start GoTo Meeting at least 5 minutes prior to meeting start time if using GTM
8. Make sure everyone knows who is running the call and what your role is.

**IMA Discussion Outline and Talking Points:**

**Build Rapport**

*Take note of where the prospect is located. Have you been there before? Do you have a friend or a family member who’s been there recently? Has their location been in the news lately? Do you have any common connections on LinkedIn? Think of other things you might have in common.*

**Set the Agenda**

“What I would like to do on the call today is learn about your business, understand more about what you’re trying to accomplish with your sales and marketing efforts and then do an analysis on your site based on what we’ve discussed. Does that meet your expectations for the call?”

**Warm Up/Big Picture**

“I spent some time on your website and I think I have pretty good idea of what your business is all about. I would like to find out a little more from you.”

“Can you tell me a little bit about your role at \_\_\_\_\_\_\_?”

**Conversation Guideline:** Remember this is a CONVERSATION not an interrogation. It is critical to weave these questions into a natural CONVERSATION about your prospect’s business. Remain genuinely curious about what your prospect does.

“When you meet someone new, what’s the quick description you use to tell them what your company does?”

“How many employees do you have?”

“How do your customers buy your product?”

“What role does the website play in bringing in business?”

“Who is your target audience?”

“Who do you sell to?”

“If your best prospect called you right now, what are they like? (Job title, age, male/female, etc…)”

**Explore Prospects Goals**

“I want to make the call is valuable for you and make sure the tips and recommendations I share will be valuable.”

“While I have done some analysis using a few of the tools in the HubSpot software, I want to give you the best advice. To do that I’d like to learn more about what you’re looking to accomplish through your marketing. Would that be OK?”

“Do you have any specific goals or objectives the company is working to hit in 2011? (Revenue, sales, leads, etc…)”

“What is the overall marketing or sales strategy for 2011?”

“What are your top 3 initiatives for the year/quarter?”

“How many leads do you need to bring in to hit the goal?”

**Conversation Decision Point:**

* If the prospect is giving you useful answers and they are interested in sharing insights continue to follow the GPCT question path.
* If the prospect does not have answers to your initial goal questions, you need to switch gears, move to the Competitor’s and start giving guidance on what they need to do to make their website a revenue generator.
* If the prospect is resistant to answering your questions move to the Competitor’s Report and start giving guidance on what they need to do to make their website a revenue generator, and try to work your way back to the GPCT question path.

**Understand Current Plans**

“Now that I have a clearer understanding of what you’re working to achieve, I’d like to get some insight into what you’ve done so far and what else you have planned to hit your goal.

**Conversation Guideline:**

* Based on how the conversation unfolds, it is important to explore the consequences and implications of the PLAN your prospect has to hit their GOAL.
* In many respects CHALLENGE questions can be used to discover consequences and implications. You will find CHALLENGE questions in the CHALLENGE section below.
* IMPORTANT: Consequences and implications do not have to be negative. For example:
  + “If that plan works and you absolutely blow the doors off your goal, what does that do for the company? What does it do for you?”
  + “What if the opposite were true, what happens if you don’t hit it?”

**Conversation Decision Point:**

* You goal is not to ask ALL of these questions. Ask enough to get a clear understanding of how your prospect intends to hit the goals they outlined earlier in the IMA. It is essential that your questions are asked in the context of a CONVERSATION.
* If you are not getting good answers, if the prospect is getting annoyed at the questions you are asking, if the prospect doesn’t have answers to your questions move to the Competitor’s Report to start giving guidance on what they need to do to make their website a revenue generator.

“What specific initiatives are you doing to achieve \_\_\_\_\_\_ (restate their goal)?”

“What is your plan to get there?”

**Conversation Decision Point:**

It is important to know what tools they currently use. You can figure some of this out in advance using Ghostery or BuiltWith. If you were not able to, ask the following:

* What tools are you currently using (email, CRM, CMS, etc…)?

“What are you trying to achieve with the web site?”

“What did you do for sales and marketing last year?”

“What worked and what didn’t?”

“What are you going to do differently this year?”

“How many people do you have in the Marketing department?”

“What marketing activities are you engaged in now?”

“What marketing activities do you have planned?”

“What specific campaigns support these activities?”

**Conversation Guideline:**

During the discovery of your prospect’s PLANS, it can be highly appropriate to share some tips to build credibility, establish trust and set the stage to dig deeper for the information you need to QUALIFY your prospect

“Which ones are most successful?”

“Which ones didn’t work?”

“Where do your best leads come from?”

“How many leads are you generating currently?”

“Is that good, bad, or ugly?”

“How does your lead quality currently look?”

“Are all leads created equal?”

“Tell me about your sales team. Are they cold calling?”

“What does the sales team think of the leads?”

“If you are cold calling, who are you calling?

“Are you buying lists?”

“How successful have you been with those lists?”

“How many sales people are on the sales team?”

“What makes a lead ‘Sales ready’ for you?”

“How many leads do you need to hit your sales goals?”

“How often do you reach that target lead goal?”

“How much does it cost to acquire your leads/customers?”

“What are doing to reduce your cost per lead?

“How do you measure what’s working?

**Conversation Decision Point:**

If you have successfully gained meaningful answers to the prospect’s GOALS and PLANS and you do not believe the time is right to explore the prospect’s CHALLENGES, move to the Competitor’s Report and, start giving guidance on what they need to do to make their website a revenue generator, and work your way into CHALLENGE Questions.

**Conversation Guideline:**

It’s critical to take good notes during this stage of the IMA, these are statistics you’ll want to keep hand and leverage later on as you head in to the diagnostic call and begin your more advanced conversations.

**Uncover Challenges**

“You’ve given me a great view into what you are looking to accomplish and what you plan to do to get there. I’m wondering what things you think will get in your way.”

“What obstacles do you think will keep your plan from working?”

**Conversation Decision Point:**

This is a very sensitive point in the conversation. Your objective is to figure out what roadblocks might be in your prospects way to executing their PLAN and hitting their GOAL. The intention is not to ask ALL of these questions. Ask enough to get a clear understanding of what your prospect feels will be in their way. It is essential that your questions are asked in the context of a CONVERSATION.

“What’s going to get in the way of hitting \_\_\_\_\_ (state their goal)?”

“What programs do you already have in place to achieve what we’ve talked about?”

“How is that going?”

“So it sounds like that’s really hard to do. What are you going to do to ensure that works?”

“What do you think is your biggest marketing challenge?”

**Conversation Guideline:**

When discussing CHALLENGES it can be HIGHLY appropriate to mix CHALLENGE questions in with your PLAN questions. You can also ask CHALLENGE questions in the context of discussing the Competitors Report and the Benchmark App. You need to make the choice based on how the CONVERSATION is unfolding.

**Establish Timelines**

“Given everything we’ve discussed I’m really curious about how quickly you need to get things moving to achieve your goals”

**Conversation Decision Point:**

TIMELINES can be difficult to get. If the prospect is reluctant to give a timeline or does not know their TIMELINE you will need to decide:

* …if the goals and business pains you’ve uncovered need to be addressed now.
* …if this is a good fit prospect that’s worth your time to pursue despite lack of insight into TIMELINE.

“When do you need to achieve these results?”

“When do you need to hit \_\_\_\_\_ (state the goal)?”

“What is the timeline to achieve \_\_\_\_\_ (state the goal)?”

**Explore Consequences and Implications**

“I’d like to revisit your goals for a moment.” *(Start with the positive)* “When you do achieve your goals, what will that change in your business?

What will it change for you personally?

“What will accomplishment enable you to do going forward?”

*(Shift to the negative)*”Have you put thought into what will happen if you don’t achieve these goals?”

“Will it matter much if you don’t reach your goals?”

“You shared your plans with me earlier and we’ve talked about challenges. What other solutions are you investigating that you think might be able to help you achieve your goals and overcome these challenges?

“What would happen if you didn’t do anything different?”

Under what scenarios would you consider hiring someone to help you?

***Close to a diagnostic call:***

1) Do you believe I’m starting to understand some of your goals and challenges?

2) Did the information and concepts that we reviewed today, give you a better picture of how we can help you?

3) Would you like to continue discussing how we might help you?

1) Based on what I’ve learned today, there seems to be a lot of opportunity for you to leverage inbound marketing to achieve your goals. Assuming you agree, our next step is to setup another call where we do a deeper diagnostic and set goals together. Would you like to set

that up?

2) During this call, we’ll also need to talk about your budget, timing for investment, who will do what work, and your decision making process. If we come up with a solid plan that includes all of these details and you’re confident in our abilities, do you see any reason why you wouldn’t hire us to help you achieve your goals?

***Close to Not Pursuing the Sale:***

“Well I appreciate your time today and hope you’ve been able to get some great information from our call. Based on our conversation, I don’t believe you are a great fit for my services at this time. “Regardless, I want to provide you with some free resources to help with you with some of the things we discussed today. The only thing I ask in return is that you send me anyone you know who is trying to drive more qualified buyers through their web site.”

“Enjoy the rest of your day.”

**Competitors Tool**

“Let’s take a look at the analysis I ran on the HubSpot Software. The first thing we’ll take a look at is the Competitors Report.”

**Conversation Guideline:**

The Competitors Report can be used to establish your credibility and build trust with your prospect. Your objective in leveraging these two tools during the IMA is to gain insight into BANT/3C and GPCT when the customer is either not openly sharing information OR does not know the answers to the questions you are asking. It is also an opportunity to build urgency with the prospect to move forward.

“Using the competitors you gave me along with a few I found doing searches using your most important keywords, I ran them through our software which compares all of their websites to yours, so we can get a clear picture of where you stand online.”

**Conversation Decision Point:**

The following sound bites for presenting the Competitors Report DO NOT include questions. The intention is for you to use GPCT questions over the course of presenting the analysis to gain the insight you need to qualify the prospect.

There are 3 fundamental stories to tell using the competitors report:

* Your prospect is behind all of the competitors; what is it going to take to catch up.
* Your prospect is ahead of all of the competitors; what is it going to take to maintain that advantage.
* All of the competitors are roughly even; what is it going to take to break away from the pack.

“Three columns on the report are the most important; Traffic Rank, Indexed Pages and Linking Domains.”

“They tell an interesting story about who has the most authority and is likely to be getting all of the traffic and leads right now.”

“Traffic rank is like the Nielson ratings for TV where they rank all the TV shows and whichever one is most popular, gets the number one spot. In this case the website with the most traffic is ranked number one. Your site currently has a rank of \_\_\_\_\_. Your closest competitor has \_\_\_\_\_.”

**Conversation Decision Point:**

Opportunity to give a tip and move to some GPCT questions.

“Indexed Pages are the number of pages Google has indexed for a domain. The more pages in the index the more opportunities a site has to rank for their most important keywords. You currently have \_\_\_\_\_ indexed pages. Your closest competitor has \_\_\_\_\_.”

**Conversation Decision Point:**

Opportunity to give a tip and move to some GPCT questions.

“Linking Domains are the number of inbound links pointing back to your website. The more inbound links you have the more authority you have in the eyes of Google making it easier for you to rank for your most important keywords. You currently have \_\_\_\_\_ linking domains pointing to your site. Your closest competitor has \_\_\_\_\_.”

**Conversation Decision Point:**

Opportunity to give a tip and move to some GPCT questions.

**Benchmark App**

“The next thing we should look at centers around what it will take for you to gain the online advantage for your business. To do that we’ll spend some time with the HubSpot Benchmark Application which will help us get a sense of what needs to be done to get your website to work harder for you.”

“What this tool does is look at over 4,700 companies practicing inbound marketing using the HubSpot software and provides a variety of benchmarks for visits, leads and customers which are the real keys to turning your website into a lead and revenue generation machine”

“It’s really a snapshot of the sales and marketing funnel.”

“I’ve put in a few key benchmarks which we can talk about in a minute.”

“First, we should populate the tool with some of your numbers.”

“Now that we’ve got some baseline numbers in the tool we can see what kind of traffic you are going to need to generate to convert your visits to leads at the industry average.”

**Conversation Decision Point:**

* You need to ask the customer for their numbers. It is entirely possible they WILL NOT know how much traffic they are getting, the visit to lead conversion rate they need, or their lead to customer close rate.
* If they DO NOT know those numbers, have your prospect estimate their current traffic rate and use the following for the other two data points:
* Visit to Lead Conversion = 1.5%
* Lead to Customer Conversion Rate = 20%
* It is perfectly acceptable to change the numbers as the conversation progresses.
* This is also a good time to bring in some GPCT questions based on the conversation if you HAVE NOT been able to get good GPCT information up to this point.

“One of the advantages when you get started with HubSpot is the training we provide to help you begin using best practices on your website to beat the industry averages and start using your website to hit your goals.”

**Conversation Decision Point:**

Opportunity to give a tip and move to some GPCT questions

“As we move to the lower portion of the tool, we can see the key activities that drive visits, leads and customers.”

**Conversation Decision Point:**

Opportunity to qualify for two of the “3 C’s” if you haven’t already:

* Capacity and capability to create content.
* Commitment to create content and do inbound marketing for 3 to 5 hours a week indefinitely.

“Based on the data across our 4,700 customers you should to be posting at least 8 blog articles per month which is a critical driver in building indexed pages and inbound links which will lead to more visits and more conversions.”

“In addition you should have at least 4 active landing pages to covert visitors into leads.”

“As you build your reach in the marketplace, your first goal is build relationships through your marketing database and social media connections totaling at least 300 people.

“As you start to build a list of prospects and begin sending emails and engaging lead nurturing campaigns you want to see at least a 5% click through rate on the calls to action in those emails.”

“When you get started with HubSpot, we are going to teach you the most efficient and effective ways to achieve these targets and most importantly start creating more customers and driving more revenue through your inbound marketing efforts.”

**Conversation Decision Point:**

* Opportunity to give a tip and move to some GPCT questions.
* Depending on where you are in the conversation, this could be an opportunity to move into the IMA closing sequence.

**Sound Bites and Inbound Marketing Tips to use during the IMA**

**Get Found**

*SEO*

* Your page title is your most important piece of real estate. It is essential to use keywords in your page titles that your potential customers use to search for what you sell rather than just your company name or a tag line.
* Your page titles should be 70 characters long. Search engines don’t read beyond that.
* A best practice in setting up your page titles is to use pipes ‘|’ between keyword phrases.
* Every page on your site is an opportunity to rank for a new keyword, so it’s really important to have unique page titles across your site.

*Blogging*

* It is critical to have your blog set up on your own website and not on a different domain. When you set up your blog like “yourcompany.blogspot.com” all of your SEO credit goes to blogspot and not you. Youf blog should be set up like “blog.yourcompany.com.
* Search engines look at each blog article like a new page on your site which is key since it helps you quickly build your indexed pages and every page on your site page is an opportunity to rank for a new keyword.
* Each blog article should be optimized around keyword phrases your potential customers might enter when using a search engines making it easier for them to find you.
* Inbound links are made when other websites link to you. The more inbound links you have, the higher your website ranks for your most important keywords. A blog is the most natural way to get more inbound links.
* A blog is the most natural way to get a larger following and increase your reach in social media. When your potential customer shares your blog article, their network is also your target audience. And, that’s free!
* When you write your blog articles you need to talk about the needs and interests of your target audience. Think of it this way, any good sales rep knows not to talk product first, instead they should talk about their prospects needs and pains. If a sales person starts talking product right away, it will turn off your potential buyer. Blogging is the same thing. Don’t talk about yourself. Talk about what matters to your potential customers.
* When you blog with the right strategy it will make your site sticky and decrease your bounce rate.

*Social Media*

* Social media is the new word of mouth. Your potential customers are using social media to ask their network for references and to do their research. You need to be aware of the conversations that are taking place regarding what you sell.
* It is essential for your blog to have social media buttons to share your content. Make it easy for people to share your interesting content with their connections.
* A blog is the most natural way to get a larger following and increase your reach in social media. When your potential customer shares your blog article, their network is also your target audience. And, that’s free!
* Search engines are now looking at your social media following to determine how you’re content will rank for your most important keywords.

**Convert**

*Convert to Traffic to Leads through Calls to Action*

* Think of a Call to Action as a transaction for information. What you are doing is creating an opportunity for a visitor to your site to trade their valuable contact information for a piece of information you can provide that helps them solve something, learn something or make a better decision. Contact Us or Request a Quote aren’t enough. You need to give visitors a reason to tell you who they are.
* Think of a Call to Action as a way for someone to trade their contact information for some valuable information you can provide. It’s a give to get. If someone is doing research and looking for your type of product and services, what key things do they need to know to make a decision? Provide that insight and place it behind a form. People will trade their contact information to get it. That’s how you generate inbound leads.
* While a ‘Request a Demo’ is a great call to action, not all prospects are that far along in their buying process. You’d be able to convert more or your traffic into leads if you offered something that appeals to them earlier in THEIR research and buying process. Offer something educational like a whitepaper or an eBook. A webinar is another great way to get people to convert.
* Each page of your website is the opportunity to rank for a keyword and each blog article can be shared individually across social media so it is highly likely visitors might come to your site and only see one page. That’s why it is so important to have a call to action on each page because they may only see that one page. A key thing to remember is that your calls to action don’t need to be unique for every page; you can use the same one across multiple pages.

*Convert to Leads to Customers through lead Nurturing*

* When a visitor fills out one of your forms, they might not be ready to talk to a sales person yet. When someone fills out a form the prospect should be nurtured with additional information. Some prospects aren’t ready to talk to a sales person yet, however additional nurturing or information can make them more sales ready.

IMA MUST HAVE’S

* Do they have control of their site – what is it built on
* Do they have a CRM
* How many contacts do they have