

# Lifecycle Marketing Workbook



**Infusionsoft.**  
CERTIFIED PARTNER

# Attract More Leads to Your Business

Identify your target market and bring in new leads

## Identify and attract your target market



**Who are my ideal customers?**

(use demographics and other details you have gathered)

.....

.....



**What do they care about?**

(efficiency, ease of use, time, etc)

.....

.....



**Where do they “hang out?”**

(social media, online, conferences, etc)

.....

.....



**What would be attractive to them (what is the “apple” that they would enjoy)?**

(educational materials, coupons, contests, etc)

.....

.....



**How can I make a “corral” for potential customers who are interested in the attractive offer?** (database, spreadsheet, CRM, etc)

.....

.....

# Sell More, Earn More

Get organized, educate your leads and close more sales

## Educating Leads

**1. What questions do potential customers have before they buy from me?**  
(product details, cost, warranty, social proof, etc)

.....

.....

.....

**2. How can I address those concerns?**  
(email series, white paper, website, videos)

.....

.....

.....

**3. How can I offer more value as I educate potential customers?**  
(send additional resources, showcase differences between our product and others, special offers, etc)

.....

.....

.....

.....

## Make the Offer

**1. What is my compelling offer?**

.....

.....

.....

**2. When should I extend the offer?**

(after they read the e-book, after a conference, when they initiate a call with a sales rep, etc)

.....  
.....  
.....

**3. What does a prospect that is ready to buy “look like?”**

(watched a video, read an e-book, etc)

.....  
.....  
.....



**Close the Sale**

**1. How do customers buy from me?**

(online, in person, sales team)

.....  
.....

**2. Is this an easy way to buy?**

.....  
.....

**3. How can I make it even easier?**

.....  
.....

**\* Take some of the ideas you brainstormed above and choose 2-3 actionable items you can start implementing right away.**

**4. What are the top 2-3 things I can do to improve my selling system?**

1 .....  
2 .....  
3 .....

# Wow Your Customers

Create a culture of Wow to earn repeat sales, referrals and testimonials

**1. What are 5 things I can do to wow my customers during the first 30 days?**

(send cards, quality and unique packaging, coupons, personal phone call, etc)

1

2

3

4

5

**2. What are 5 things I can do to continue to wow my customers after the first 30 days?**

(periodic surveys, birthday cards, holiday announcements, etc)

1

2

3

4

5

**Circle your top 2 ideas** for each category and start to put a plan in place.

## Additional items to work on

**1. How can I find out how my customers are feeling?**

(surveys, email, phone call, etc)

.....  
.....  
.....  
.....  
.....

**2. When a customer isn't happy, what can I do to reach out and make the situation better?**

.....

.....

.....

.....

**3. When a customer is happy, how can I ask for referrals, repeat sales or testimonials?**

.....

.....

.....

.....

# Wow My Customers Worksheet

1. Place an X in the box next to the items that you'll want to use to wow your customers.
2. Add additional items that you want to incorporate in the space provided.

## 50 Cost-effective Ways to Wow Your Customers

Fulfill orders on time	Respond to complaints
Follow-up with emails	Call them and say thank you
Answer questions that they pose	Send a handwritten thank you note
Send a \$5 gift card with every purchase	Send a lottery ticket with every purchase
Start a rewards or loyalty program	Feature a customer on your website
Provide a surprise discount	Send cookies, fruit, or flowers
Send a book with a personal note	Donate on behalf of your customer
Send a pizza or a pizza gift card	Plant a tree on behalf of your customer
Provide special private shopping hours or prizes during certain hours	Meet up with customers in the cities that you are visiting
Throw a party for all of your customers at your next major event	Randomly select a few customers to receive a product that you upsell
Provide a gift card for an item in your store or on your website	Provide an upgrade for free
Provide offers to customers who contribute ideas or engage with your company online	Send unique swag, such as a guitar pick earrings for music lovers or sippy cups for parents with kids
Celebrate an event, such as a birthday or anniversary	Schedule lunch at your office and invite customers to attend and share feedback
Celebrate a milestone, such as number of years as a customer	Tell your customers how their feedback was implemented
Send a gift card for a free car wash	Give them a free song download
Offer free wrapping for product purchases	Include a free USB flash drive with their order
Name a star after their company	Send a laminated reference guide or chart
Send a box of office supplies	Create a video message and send it via email
Send them a Payday candy bar	Send a small gift
Provide group/bulk order opportunities	Upgrade their shipping to priority mail
Follow them on Twitter	Hire them
Give them bonus items	Pre-order exclusive items
Send personalized address labels	Give them an inexpensive photo album
Send samples of new products	Provide a make-over related to your product
Give a night out at the movies	Send them a travel mug filled with tea

