

We Help Small
Businesses
Succeed

In partnership with



Infusionsoft is the leading sales and marketing software built for small businesses. Our software, services and educational content help small businesses get organized, grow sales and save time. By combining sales and marketing tools in one system, we help entrepreneurs save time and simplify operations.

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Lifecycle Marketing



PLANNER

WELCOME

Creating a sales and marketing strategy for your small business can be daunting. Marketing your business involves more than an amazing storefront, nice signage, a well-designed website and a blanket of ads across your local market.

It's a strategic plan that includes tactics and tools that are precisely targeted to the audience that you're trying to attract.

The Lifecycle Marketing framework has proven ideas and innovative strategies designed **to help you get more customers, grow your sales and save time.**

This planner contains everything you need to keep your small business on track for the next week, month and year. You can use this

planner to record ideas and insights about the biggest opportunities you see in your marketing and sales strategies.

Yes, it will be hard work. And yes, Infusionsoft will be right here with you as you do it. Let's create a sales and marketing strategy together, one step at a time.

Now, let's get started!



The Lifecycle Marketing framework will help you get more leads, grow your sales and save time.

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INTRODUCTION

Infusionsoft's Lifecycle Marketing framework provides a simple model that you can use to attract leads, grow sales and wow your customers.

Lifecycle Marketing was developed by a team of sales and marketing experts at Infusionsoft, and has helped thousands of small businesses achieve success.

The beauty of Lifecycle Marketing is in the simplicity of the framework, which can be

applied to any small business, regardless of industry or business model. When put into action, Lifecycle Marketing will help you grow sales AND give you more time to focus on the things you love.

When put in to action, Lifecycle Marketing will help you grow sales AND give you more time to focus on the things you love.

Lifecycle Marketing

SALES & MARKETING STRATEGY FOR SMALL BUSINESS



ATTRACT is the first phase in the Lifecycle Marketing framework. In this phase, you will focus on these stages:

- ✓ Know Your Target Customer
- ✓ Attract Interest
- ✓ Collect Leads



SELL is the second phase in the Lifecycle Marketing framework. Here you will learn how to convert followers to fans by focusing on these stages:

- ✓ Educate
- ✓ Offer
- ✓ Close



WOW is the third and final phase in the Lifecycle Marketing framework. This phase is designed to help you create raving fans and keep them coming back for more. In this phase you will:

- ✓ Deliver and Wow
- ✓ Offer More
- ✓ Get Referrals



GETTING STARTED

Review the questions in each of the 3 phases. Select each statement where the answer is yes. Assign one point to each of those statements and total your score for each phase. The phase with the lowest score should be your starting point in building your Lifecycle Marketing strategy. If there is no clear phase to begin with, we recommend that you start with the Attract phase.

Attract:

- | | |
|--|---|
| <input type="checkbox"/> I'm clear about who my target audience is. | <input type="checkbox"/> I currently utilize lead magnets to attract traffic to my business. |
| <input type="checkbox"/> I know the pain points of my target audience. | <input type="checkbox"/> I use more than 2 types of lead magnets. |
| <input type="checkbox"/> I understand what my target audience cares about. | <input type="checkbox"/> I utilize social media to attract traffic to my business. |
| <input type="checkbox"/> I'm clear about who is not my target audience. | <input type="checkbox"/> I have a formal process for collecting prospect information. |
| <input type="checkbox"/> I understand what makes my business stand out from the crowd. | <input type="checkbox"/> I have a system to organize potential customers once I have their information. |
| <input type="checkbox"/> I know where my customers 'hang out'. | |
| <input type="checkbox"/> I have a formal process for generating leads. | |

TOTAL POINTS:

Sell:

- | | |
|--|---|
| <input type="checkbox"/> I anticipate questions that potential customers have before they buy from me. | <input type="checkbox"/> I have a system in place to identify when someone is ready to buy. |
| <input type="checkbox"/> I have a clear content strategy. | <input type="checkbox"/> I understand what offers work to convert sales. |
| <input type="checkbox"/> I have clarity around my compelling offer. | <input type="checkbox"/> I have a clear process for closing the sale. |
| <input type="checkbox"/> I know how potential customers make decisions on what and when to buy. | <input type="checkbox"/> It's easy to buy from me. |
| <input type="checkbox"/> I understand my customer's buying journey. | <input type="checkbox"/> My sales team has been fully trained on sales procedures. |
| <input type="checkbox"/> My sales process is mapped to my customer's buying process. | <input type="checkbox"/> I have a strategic plan for making it even easier to buy from me. |

TOTAL POINTS:

Wow:

- | | |
|--|---|
| <input type="checkbox"/> I have a consistent plan to wow my customers. | <input type="checkbox"/> I have a customer loyalty program. |
| <input type="checkbox"/> I fulfill on time or early if possible. | <input type="checkbox"/> I offer additional product/service at the point of sale. |
| <input type="checkbox"/> I provide a quality service or product. | <input type="checkbox"/> I have a formal referral program. |
| <input type="checkbox"/> I send a personal thank you note to customers. | <input type="checkbox"/> I have a process to ask every customer for referrals. |
| <input type="checkbox"/> I send a small thank you gift to customers. | <input type="checkbox"/> I have a formal incentive program to reward people who refer others. |
| <input type="checkbox"/> I call my customers to check-in and thank them. | |
| <input type="checkbox"/> I have a process to generate repeat sales. | |

TOTAL POINTS:

It's important to narrowly define your target customer and meet them where they are.



Build My Target Customer

Demographics: the average or typical characteristics of your target market .

Psychographics: what motivates them to take action.

 Age <input type="text"/>	 Gender <input type="text"/>	 Marital Status <input type="text"/>
 Children <input type="text"/>	 Income <input type="text"/>	 Education <input type="text"/>
 Region <input type="text"/>	 Hobbies <input type="text"/>	 Values <input type="text"/>



ATTRACT MORE CUSTOMERS TO YOUR BUSINESS

Once you know who your target customers are, you'll need to find out where they are most likely to come in contact with your brand, and be receptive to your messaging.

Think about location both online and in person. Are they on a particular social media platform? Do they attend local business events? Are they members of a local community or work in the neighborhood?

After you've identified where they are, start focusing your efforts there. Perhaps this means that you need to join a local

networking group, open up a Twitter account or spend some money on advertising. Be where your customers are and start engaging with them in an authentic, helpful and personable way.

Use lead magnets, like videos, free reports, coupons or giveaways to attract more of your target audience to your business.

Where do my customers "hang out"? (Social media, online, conferences, etc.)



CLOSE MORE SALES

Closing the sale involves more than just an exchange of money or signed documents.

In a direct sales conversation, the close involves clear communication, good presence and written documentation.

In an eCommerce business, the close involves ensuring that there is a mechanism

for collecting payments and processing the order. Regardless of your business type, the close is the signal that the deal has been negotiated and you can now begin the process of delivery (and eventually sell more).

How do customers buy from me? (Online, in person, sales team)

How do I make it easy to buy from me?

How can I make it even easier?

What are the top 3 things I can do to improve my selling system?

1.

2.

3.



KEY ACTIONS IN THE NEXT 30 DAYS:

MAP YOUR LIFECYCLE MARKETING STRATEGY

Based on your results in the "Getting Started" section & in each individual section define your desired goals for the next 30 days. Use this page to map your strategy for each of the 9 stages. Once you've begun to implement your new Lifecycle Marketing strategy you need to track your progress. Use this data to determine where to improve upon your strategy.



TARGET:



ATTRACT INTEREST:



COLLECT LEADS:



EDUCATE:



OFFER:



CLOSE:



DELIVER & WOW:



OFFER MORE:



GET REFERRALS:
