

The 5 Keys to Retain Customers for Life

Marisa Smith

Owner/Founder, The Whole Brain Group



Kate Walsh

Director of Services, HubSpot



#1

Set Expectations During the Sales Process

Educate on "Inbound 101"

1. Ideal Customer and Personas
2. Competitors and Differentiators
3. Sales and Marketing Alignment
4. Optimizing for Lead Generation
5. Compelling Content
6. Measuring Results



Understand Client Motivations

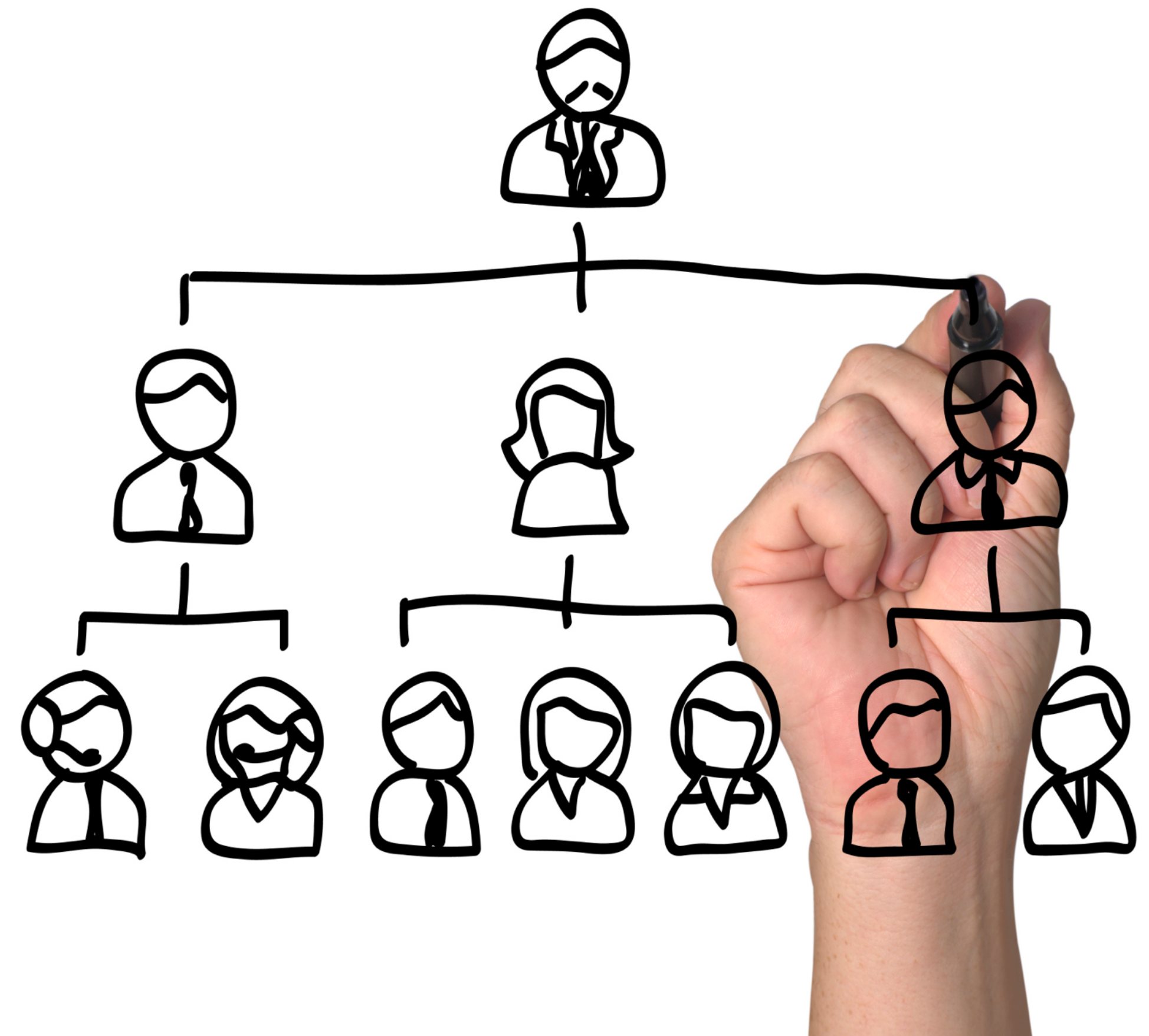
1. Company direction and vision
2. Company history and leadership team dynamics
3. Other strategic initiatives
4. Effort and attention available to devote to inbound

Avoid companies in crisis!



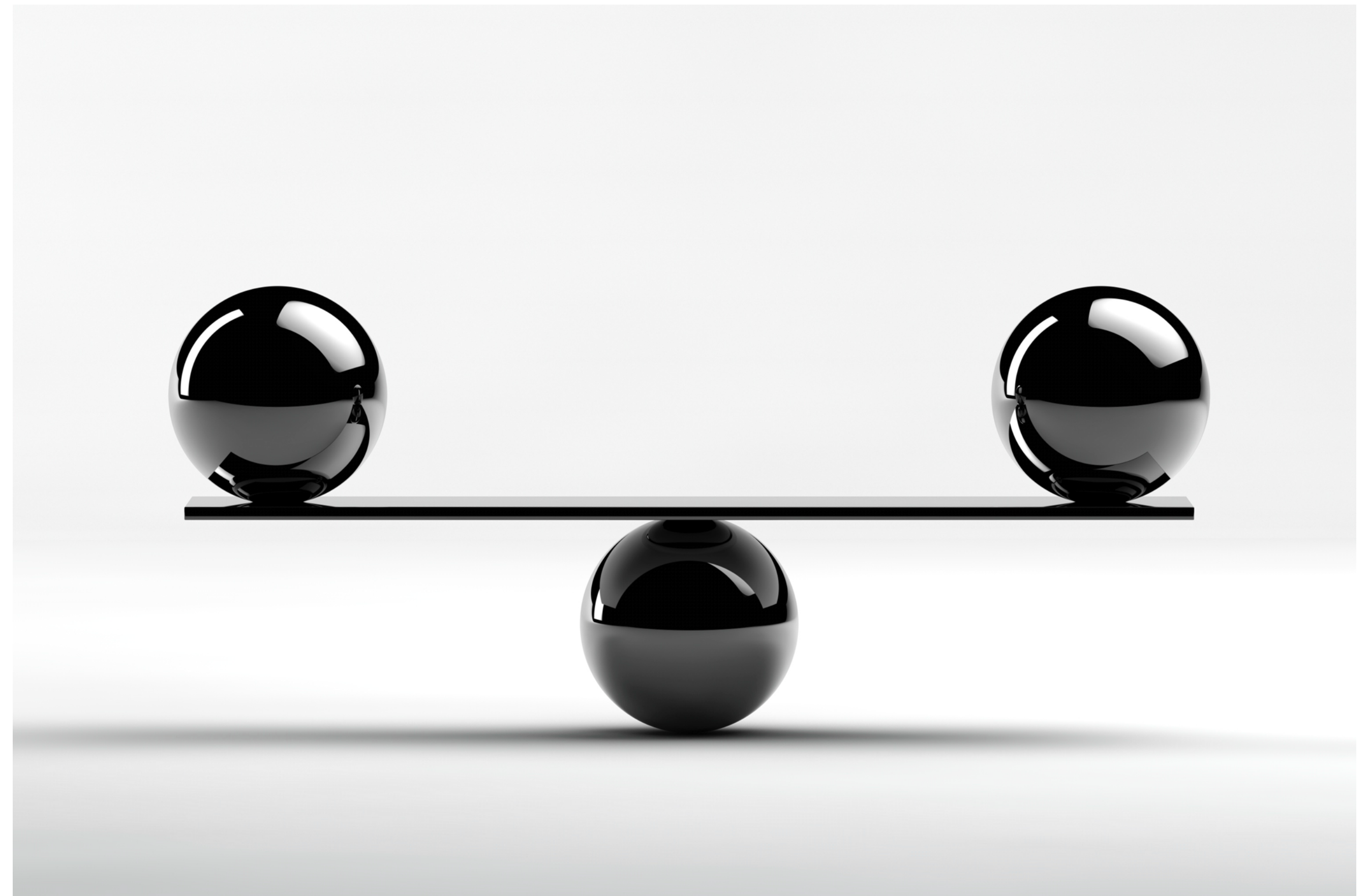
Clarify Accountabilities & Pacing

1. Roles and responsibilities
2. Establish C-Suite involvement
3. Risks and potential delays
4. Time commitment
5. Meeting pulse



Set Expectations with HubSpot Subscription

1. One-year contract
2. Payment terms
3. Review impact of # of contacts on subscription fee
4. Review renewal date - add to calendar



Setup an Onboarding Phone Call

1. Review SOW
2. Review roles and responsibilities
3. Establish communication preferences
4. Get account logins
5. Schedule first 3-4 meetings



#2

**Establish a Shared Vision of
Success**

Align **Leadership, Sales, and Marketing Team** on Goals, Target Customer(s), Competitors & Content Strategy

1. Document Ideal Customer Profile
2. Document Buyer Personas
3. Document Competitive Advantage
4. Document Sales Process and Gaps
5. Document Social Media, Content and Lead Generation Strategy



Develop a Phased Approach

1. Document 1, 3, 5 year company goals
2. Choose 3-4 priorities to focus on in Q1
3. Start with an Inbound Plumbing phase
4. Develop healthy habits
5. Chip away at the issues list over the next 3-4 quarters



Orient to Strategic Process & Meeting Pulse

1. Quarterly Planning and Priority Setting with Client Leadership Team
2. Monthly Results and Planning
3. Weekly/bi-weekly checkin with standard agenda
4. Annual planning

Include sales AND marketing team members



Document Vision of Success

Acme Corp. has just finished 2016, marking three consecutive years of 15% growth, year over year. Internally, Acme is running smoothly. We've established and documented processes for each department, and have set up a company-wide intranet that is used to communicate new initiatives, goals, and to keep everyone on the same page regarding the message being shared by marketing.

When Acme and WBG hold our regular quarterly planning sessions, we are driven by the goals established by Acme leadership, and define specific metrics that will determine our success. The Acme brand is well-recognized and respected in the industry because of a reputation for educating customers and demonstrating thought leadership and innovation. Dynamic marketing campaigns enhance the Acme brand while creating educated customers who love to work with them and see the value and importance of XYZ product.

Acme's website is a destination for both evangelists seeking helpful facts and a community for like-minded people, as well as enterprise-level organizations seeking information about XYZ. The resource center is stocked with videos, downloads, podcasts, and webinar recordings on hundreds of topics related to XYZ.

#3

Surprise & Delight

Send a Welcome Kit

1. Books you love (or have written!)
2. Company swag
3. Personalized note from the team



Monitor & Commend Social Success

1. Set up Google Alerts, HubSpot, and Newsle to look for customer mentions
2. Share customer success on your own social channels
3. Ask your team to help circulate content you create for customers



Define Attitude of Partnership & Collaboration

1. Establish C-Level relationship
2. Honesty and trust on both sides
3. Good steward of their budget and resources
4. Respectful of each other's time
5. Receive feedback gracefully and in the spirit of continuous improvement



Learn Pain Points, Provide Resources

1. Listen for pain points in other areas of the company - connect them with resources
2. Introduce them to other best practices, books, podcasts
3. Give leadership team feedback about their team members if needed



#4

Regular Communication & Goal Setting

Annual, Quarterly, and Monthly Goal Setting

1. Establish annual goals and priorities
2. Relate your quarterly priorities back to the annual goals
3. Relate your monthly activities back to your quarterly priorities
4. Channel your inner Luke Skywalker (Stay on target...stay on target...!)



Identify and Address Issues Each Quarter

1. Stay focused on 3-4 priorities per quarter
2. Establish a parking lot for issues that are important but not urgent
3. Prioritize issues that come up in between. Pick something to stop doing - don't just add more stuff (unless your budget is going to increase!)



Uncover Other Projects to Assist With

1. Establish a Sales and Marketing Extras budget for the stuff that comes up
2. Try not to cannibalize your inbound budget with stuff that isn't really inbound
3. Dig for pain and see if you can help solve other issues - especially on the sales side of things

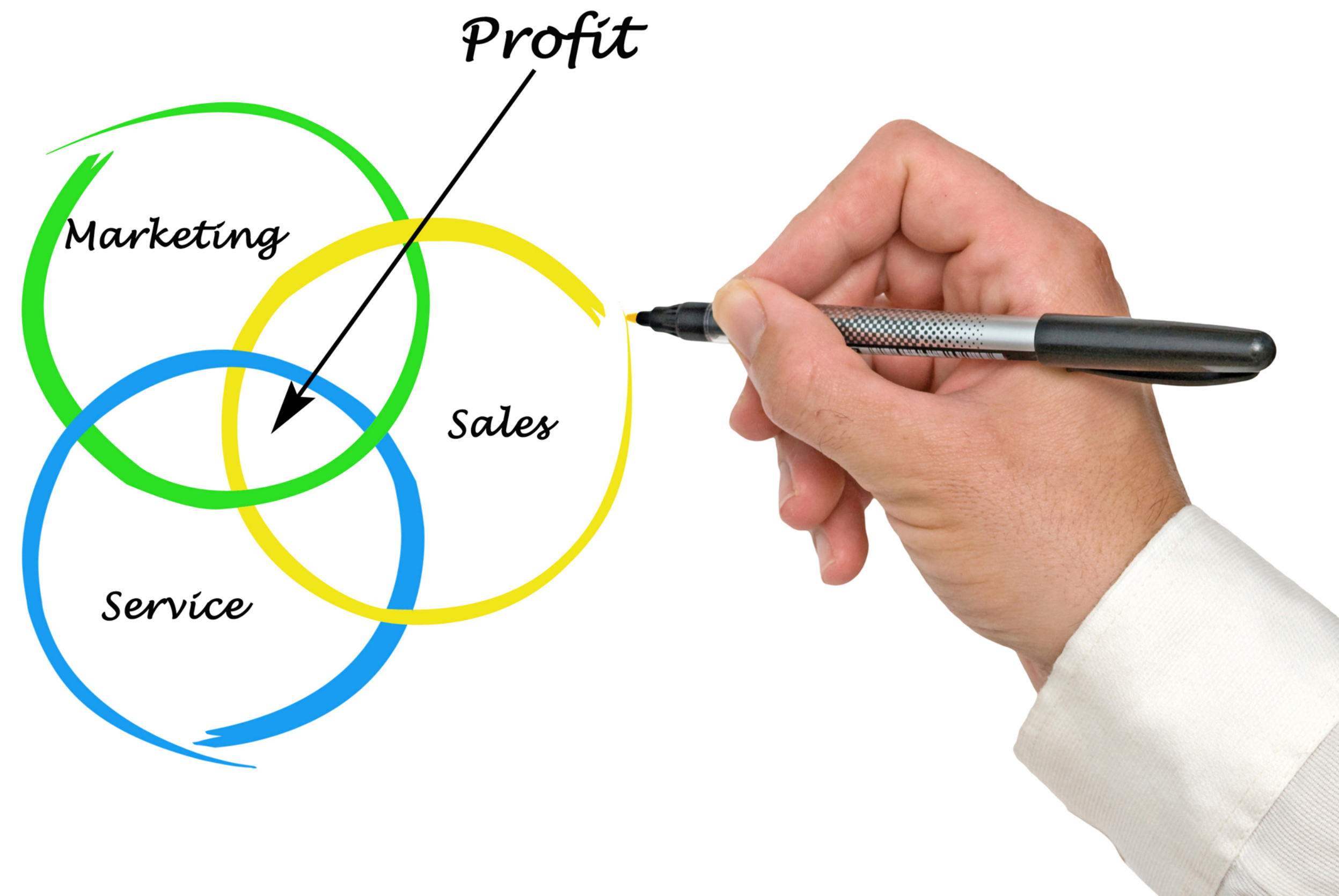


#5

**Increase “Share of Wallet” by
Deepening Relationship**

Have Marketing "Touch Other Areas of the Company"

1. Sales and Account Management
2. Culture, Recruiting, and Training
3. Customer Service and Support
4. Company scorecards
5. Strategic planning



Help Them Grow to Create More Problems

1. Hiring, firing, and training sales team members
2. Sales process, CRM best practices, proposals and presentations
3. Scalability of service delivery or manufacturing
4. Scalability of culture and leadership



Delighted Customer: Total Security Solutions

"Marisa and the WBG team truly care about the success of our company - the resources, tools, and best practices we have been introduced to are helping TSS become more scalable so we can support the leads and sales that are coming in through inbound marketing. We grew almost 80% last year, which was exciting - but also shed light on a lot of areas where we need improvement. We expanded our engagement with WBG so they could help guide us through these growth challenges, prepare us for additional growth, and help us achieve our vision."



Jim Richards, CEO

Delighted Customer: Deque Systems

"We've expanded our relationship with the Whole Brain Group over the last four years as our company has grown and encountered new challenges. We started out with a simple website project, and now have the best digital presence in our industry. Developing a vision of success and using the Traction process helped us implement a phased approach that has evolved as we've grown. The WBG team members are true advocates for Deque, evangelists for our services, and partners for our future."



Anik Ganguly, COO & VP Sales

5 Keys to Retain Customers for Life

1. Set Expectations During the Sales Process
2. Establish a Shared Vision of Success
3. Surprise & Delight
4. Regular Communication & Goal Setting
5. Increase "Share of Wallet" by Deepening Relationship

SESSIONS UP NEXT!

WHY WE'LL WIN TOGETHER (BENIOFF)

PETER CAPUTA, VP SALES, HUBSPOT

CUSTOM MATCH: CONNECTING WITH THE PERFECT CLIENT (FISHTANK)

AUSTIN SHEPARD, SENIOR MARKETPLACE ENGINEER, HUBSPOT

PRICING & PACKAGING (SANDBERG)

ARJUN MOORTHY, DIR PARTNER PROGRAM, TODD HOCKENBERRY, FOUNDER & CEO TOP LINE RESULTS

MARKETING COLAB: THE NEXT ZILLION LEAD EBOOK (MINDFIELD)

HUBSPOT + PARTNER MARKETERS

MANAGING LEADS WITH NEW PARTNER TOOLS (LACKEY)

BRIAN MCMULLIN, SENIOR PM, ARJUN MOORTHY, PARTNER PROGRAM DIRECTOR