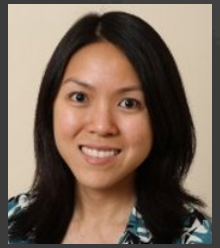
GOAL SETTING & PLANNING TO ADVANCE THE SALE

Partner Certification – SELL INBOUND TOGETHER

David Weinhaus
Hubspot Channel Account Manager
@davidweinhaus
www.davidweinhaus.com



Katie Ng-Mak
HubSpot Sales Manager
@kngmak

HubSpot Academy

Full training series available at

www.davidweinhaus.com/sas (in beta)

Password: sprocket

Find ‘Additional Learning Resources’ as well

Look for formal release within Academy Q2

AGENDA

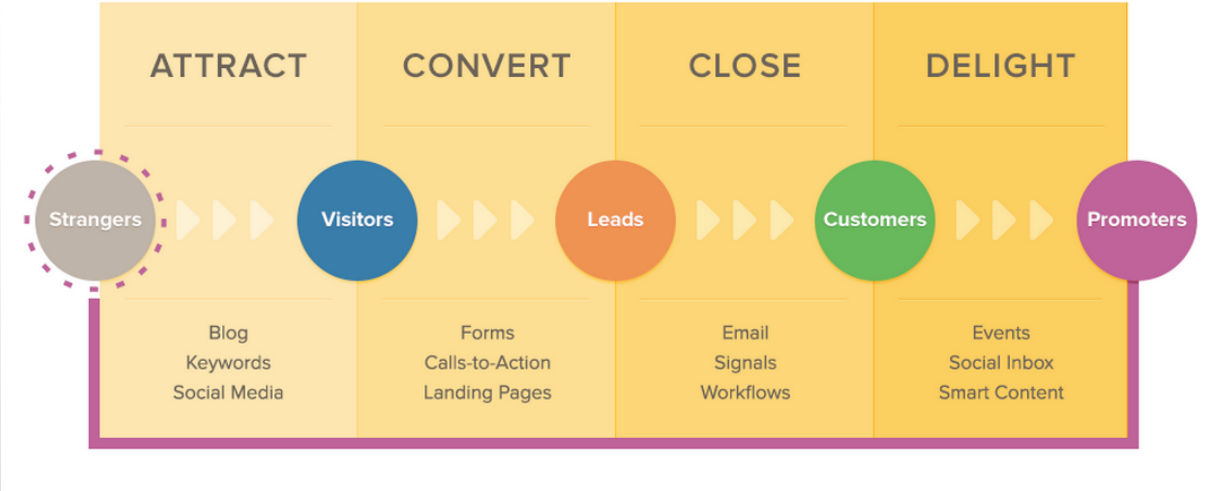
1 Why the Goal Setting and Planning Call?

2 How to Run the Goal Setting and Planning Call

3 Next Steps

1 WHY THE GOAL SETTING AND PLANNING CALL?

In the Exploratory Call - we purposely laid out tips across The Inbound Methodology



But, we didn’t prescribe a full solution yet

Reminder – In the Exploratory Call – we uncovered BANT, but likely left some elements uncovered

- **(B)udget** – Do they have the budget to afford your services?
- **(A)uthority** – Are you dealing with a decision making authority?
- **(N)eed** – How compelling is the prospect's need?
- **(T)iming** – Is there a compelling to buy now?

Reminder - How we likely closed the Exploratory Call:

*"Mr. Prospect. It sounds like you have very meaningful goals. What I typically suggest as a next step is to schedule a **goal setting and planning call**. We'll go into more depth on your goals, and then begin to break out specific inbound activities and levels that could help you reach them. The call typically takes about an hour and by the end, you should have a good starting inbound marketing plan...*

...Would you like to do that?"

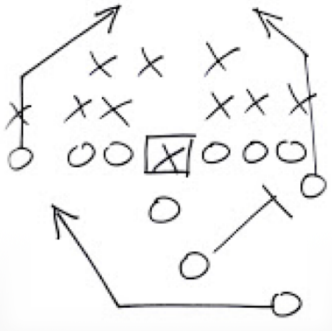
WHY DO WE RUN THE GOAL SETTING AND PLANNING CALL?

1. Help the prospect **translate their goals into Inbound targets.**
2. Continue to **qualify** for BANT to ensure a fit

...continued...

WHY DO WE RUN THE GOAL SETTING AND PLANNING CALL? (continued)

3. Lay out a **plan** for the prospect to follow



4. Reach **mutual agreement** on the goals, target, and plan

A Word on Expectations

1. We are going to hit on goal setting and planning today.
2. Let's keep it interactive
3. If we don't get through the whole deck,
    1. This deck available online www.davidweinhaus.com/partner-day
    2. Recorded beta version at www.davidweinhaus.com/sas (pw: sprocket)

2 HOW TO RUN THE GOAL SETTING AND PLANNING CALL

HOW TO RUN THE GOAL SETTING AND PLANNING CALL

- ☑ Begin the call
- ☑ Translate goals to Inbound Targets
- ☑ Develop a plan with the prospect
- ☑ Close the call

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Beginning the call

1. **Set agenda** – The purpose of today's call is to…
   - Establish marketing targets based on your goals
   - Determine a plan to get to those targets
   - At the end, I can outline how I would put together pricing/investment options and resources to help you if it makes sense.

Beginning the call… (continued)

2. **Check-in on agenda**– How does the agenda sound? What else would you like to cover?
3. **Summarize** – Restate key takeaways from the Exploratory Call, particularly their Goals, Plans, Challenges (GPC)
4. **Check-in on Summary -** How are you feeling? What did I miss?

Let's Begin…

When checking in, remember the homework from the Exploratory Call

- Did they do the **homework**?
  - Gather visits, leads, customer data
  - Review assigned ebook, webinar, blog articles, other?
- How did they feel about it?

What if the prospect has objections?

1. Spend time covering objections
2. Don’t move forward unless it makes sense – might need to backtrack and revisit Exploratory Call.

HOW TO RUN THE GOAL SETTING AND PLANNING CALL

- ☑ Begin the call
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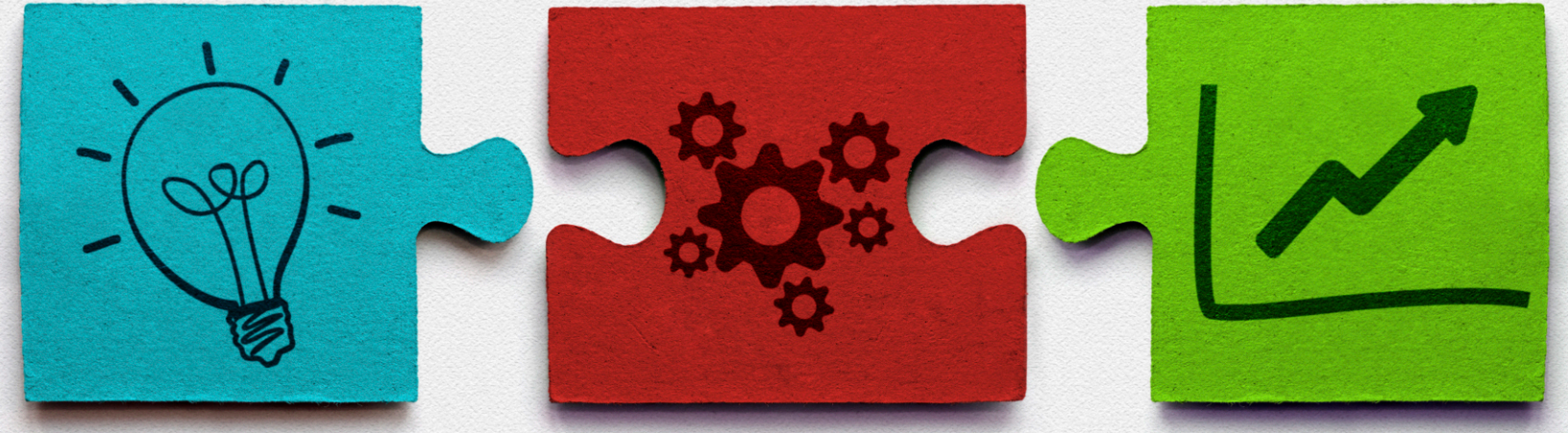
- ☑ Develop a plan with the prospect
- ☑ Close the call

Use tools



Your **Client Funnel Analysis** tool will help you navigate the conversation.

Client Funnel Analysis tool

Client's Inbound funnel analysis	Current funnel
Traffic/mth	10000.0
Leads/mth	100.0
Customer/mth (inbound only)	2.0
Visitor:Lead conversion	1.0%
Lead:customer conversion	2.0%

There are three main parts to the Client Funnel Analysis: traffic, leads, and customers.

*Find the Client Funnel Analysis tool in Additional Learning Resources

STEP #1 – Review their current metrics – visits, leads, customers

Client's Inbound funnel analysis	Current funnel
Traffic/mth	10000.0
Leads/mth	100.0
Customer/mth (inbound only)	2.0
Visitor:Lead conversion	1.0%
Lead:customer conversion	2.0%

Blue Cell equals enterable text

Don’t just fill in numbers – have a discussion about their funnel.

Examples questions for step #1:

- *“Ms. Prospect, these numbers are interesting. How do you feel about them?”*
- *“Ms Prospect, I notice your lead conversion rate is low. Has that come up before?”*
- Etc…

STEP #2 – Determine traffic and leads to reach their desired customers per month (from inbound)

Client's Inbound funnel analysis	Current funnel	Desired customers at current conversion rates
Traffic/mth	10000.0	20,000
Leads/mth	100.0	200
Customer/mth (inbound only)	2.0	4.0
Visitor:Lead conversion	1.0%	1.0%
Lead:customer conversion	2.0%	2.0%

1. Enter desired customers

2. The tool calculates how many visitors & leads are needed to meet their goal (at current conversion rates)

Don’t just fill in numbers – have a discussion about their goals.

Examples questions for step #2:

- *“Tell me why that customer acquisition number is important?”*
- *“Is that a nice to have number or need to have number?”*
- Etc…

STEP #3 – Enter target conversion rates

Client's Inbound funnel analysis	Current funnel	Desired customers at current conversion rates	Desired customers at benchmark conversion rates
Traffic/mth	10000.0	20,000	4,000
Leads/mth	100.0	200	80
Customer/mth (inbound only)	2.0	4.0	4
Visitor:Lead conversion	1.0%	1.0%	2.0%
Lead:customer conversion	2.0%	2.0%	5.0%

Enter target conversation rates

STEP #3 – Show that when conversion rates go up, required traffic and leads go down

Client's Inbound funnel analysis	Current funnel	Desired customers at current conversion rates	Desired customers at benchmark conversion rates
Traffic/mth	10000.0	20,000	4,000
Leads/mth	100.0	200	80
Customer/mth (inbound only)	2.0	4.0	4
Visitor:Lead conversion	1.0%	1.0%	2.0%
Lead:customer conversion	2.0%	2.0%	5.0%

Required traffic going down

Conversion rates going up

Are you sensing a familiar pattern?

We are **exciting** with the analysis

We are further **qualifying** and determining fit with follow up questions

Congratulations! You have converted goals to Inbound Targets

Client's Inbound funnel analysis	Current funnel	Desired customers at current conversion rates	Desired customers at benchmark conversion rates
Traffic/mth	10000.0	20,000	4,000
Leads/mth	100.0	200	80
Customer/mth (inbound only)	2.0	4.0	4
Visitor:Lead conversion	1.0%	1.0%	2.0%
Lead:customer conversion	2.0%	2.0%	5.0%

Here are the prospect's Inbound Targets!

?

What if the prospect has no traffic and/or lead numbers to report?
How do I use the tool?

Answer: See next slide!

Example if prospect's website does not generate traffic

Agency's Inbound funnel analysis	Current funnel	Desired customers at current conversion rates	Desired customers at benchmark conversion rates
Traffic/mth	1,000	4,000	1,333
Leads/mth	20	80	40
Customer/mth (inbound only)	1.0	4.0	4
Visitor:Lead conversion	2.0%	2.0%	3.0%
Lead:customer conversion	5.0%	5.0%	10.0%

Sample numbers to use

HOW TO RUN THE GOAL SETTING AND PLANNING CALL

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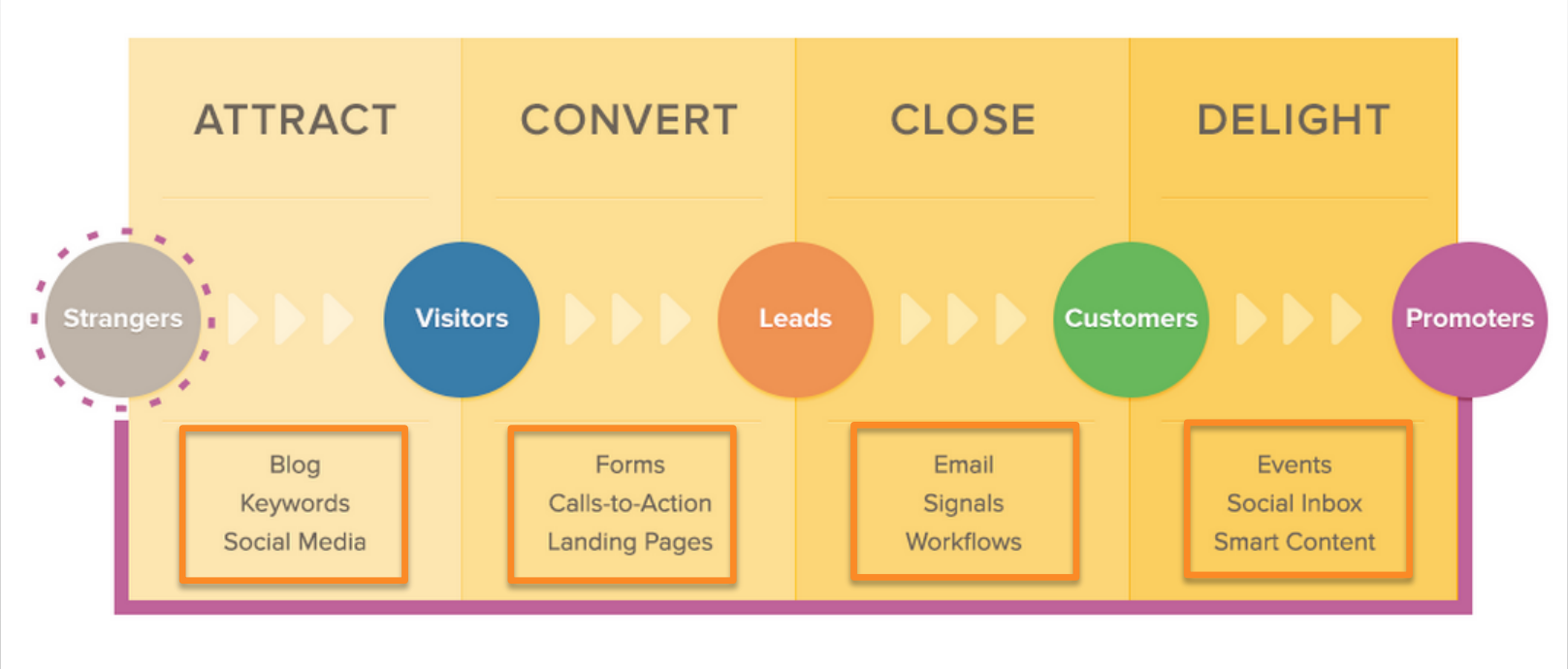
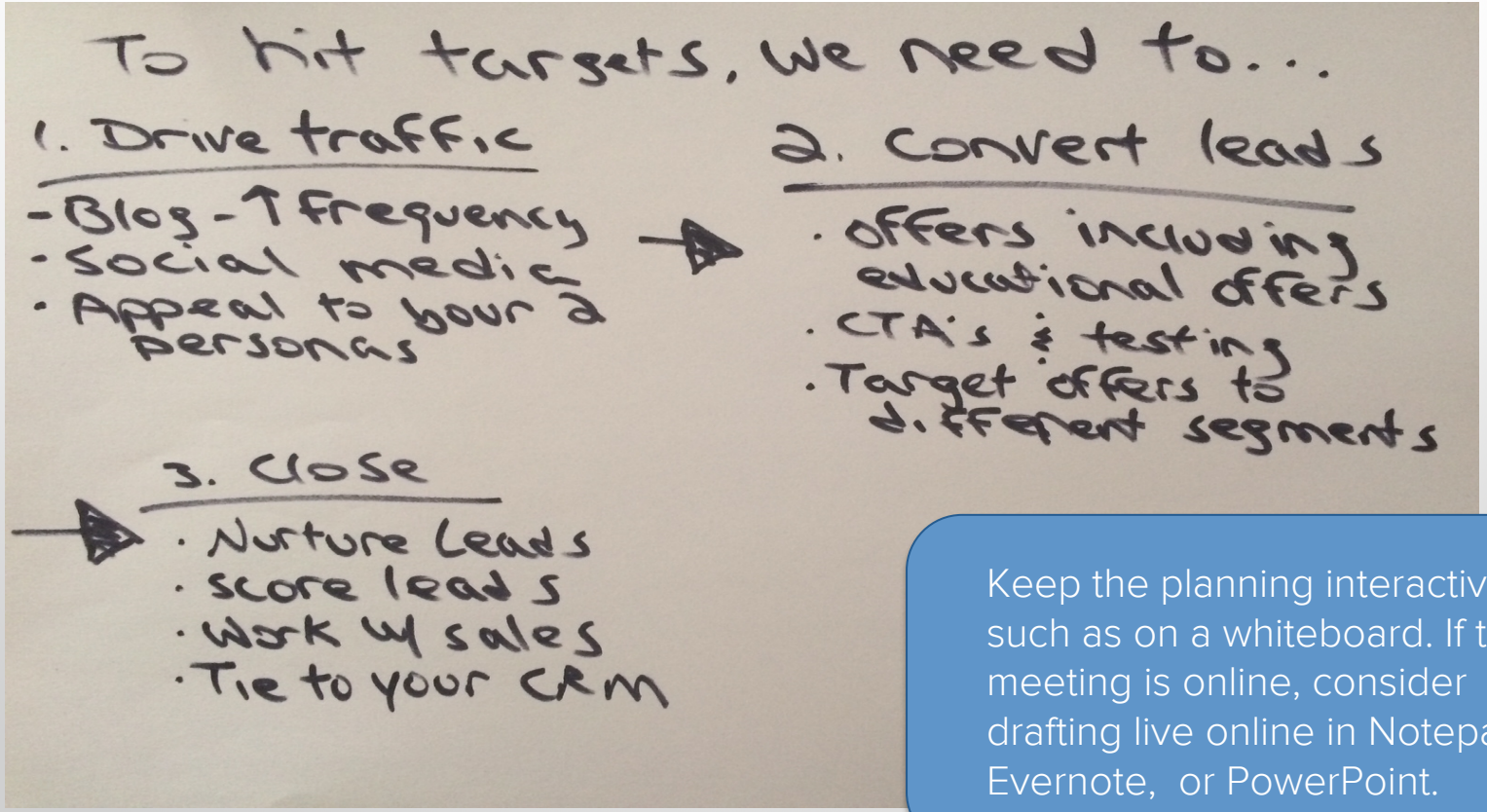
Plan activities that impact results



Use a whiteboard to take the prospect through the plan



Keep the planning interactive, such as on a whiteboard. If the meeting is online, consider drafting live online in Notepad, Evernote, or PowerPoint.

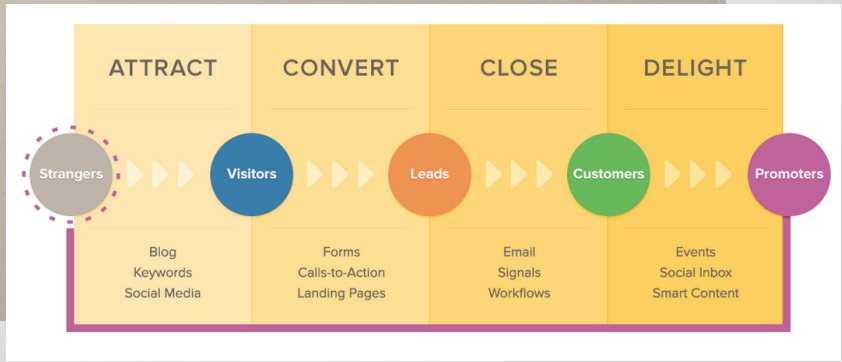
Notice how the plan aligns with the Inbound Methodology

To hit targets, we need to...

1. Drive traffic
- Blog - ↑ frequency
- Social media
- Appeal to your 2 personas

2. Convert leads
- offers including educational offers
- CTA's & testing
- Target offers to different segments

3. Close
- Nurture leads
- score leads
- Work w/ sales
- Tie to your CRM



Don’t forget your questions and tie downs

To hit targets, we need to...

1. Drive traffic
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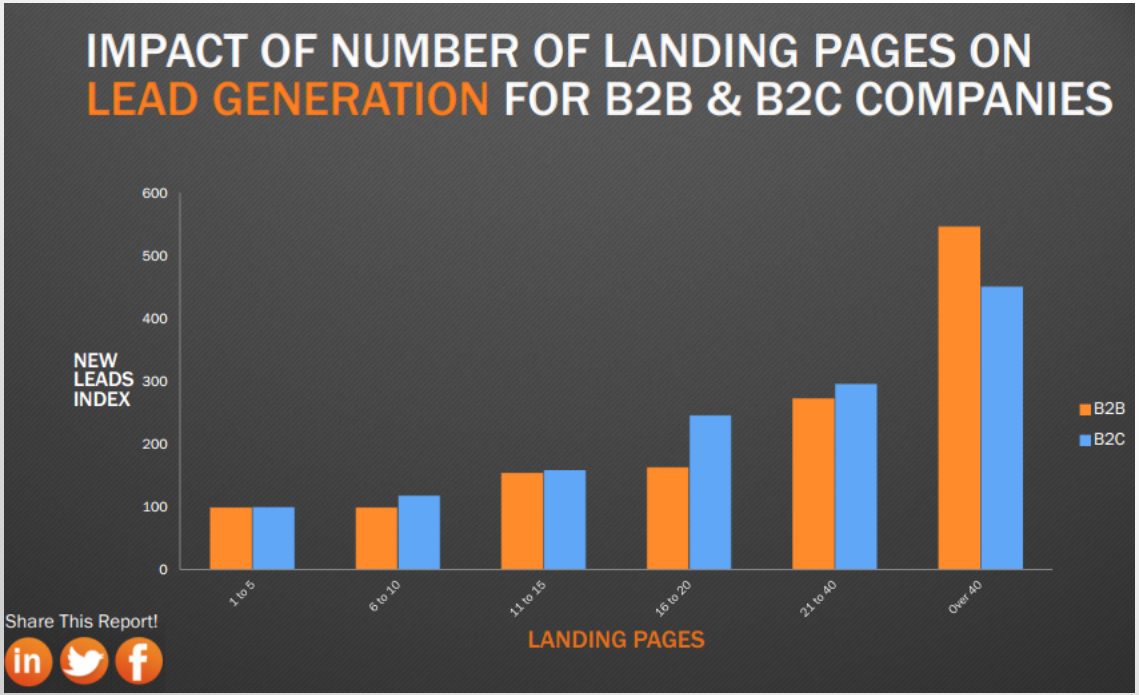
- Target offers to different segments

3. Close
- Nurture leads
- score leads
- Work w/ sales
- Tie to your CRM

“Do you have resources in-house who can do some of the work?”
“Would this be important to get going before your July tradeshow?”

Strategically drop proof points to substantiate activity levels



Source: Hubspot's Marketing Benchmarks from 7,000 Businesses - http://bit.ly/benchmarks7000

Inbound Marketing Evaluation – Optional alternative to the whiteboard

A	B
Inbound Marketing Questions	**Your Answer**
Does your website traffic increase in most months?	Yes
Is your company using social media to build brand awareness, enga	
Do you have a company Twitter account?	
Do you have a company Facebook page?	
Do you have a company LinkedIn page?	
Do you monitor social media for mentions of your brand name,	
Do you have a blog?	
How often do you post blog articles?	
What percentage of your employees post blog articles to your b	
Do you have an SEO Strategy?	
How often do you perform keyword research?	
How often do you analyze your websites pages to identify whetl	
Do you track your inbound links?	
Do you put effort into improving your current inbound links?	
Do you actively build inbound links to specific pages with specific	
Do you generate a larger number of leads via your website in mos	
What percentage of your website visitors convert into a lead? (Typ	
How many offers (ebooks, whitepapers, webinars) do you have av	
How many active landing pages do you have on your website?	
How often do you build and launch new calls to action to drive tra	
Do you generate inbound sales leads directly from organic search	
Do you generate inbound sales leads directly from social media tra	
Do you generate inbound sales leads directly from your blog traffi	
Do you generate inbound sales leads directly from pay per click tra	
Do you convert a larger number of customers from your website le	
What percentage of your website leads convert into customers? (	
How often do you send email marketing messages?	
Do you convert a larger number of customers from your website leads in most months?	Yes
What percentage of your website leads convert into customers? (Typically: 0 - 25%)	0.30%
How often do you send email marketing messages?	Monthly
Do you segment your email marketing lists and send different messages to different segments?	Yes
Do you use automated lead nurturing?	Yes
How many different lead nurturing campaigns do you have setup?	1-5
Does your web analytics notify you/your sales team when a lead is visiting the website?	Yes
Does your website analytics track which pages your indiviual leads view?	Yes
Does your website analytics track the traffic source/marketing activity/campaign for each lead?	Yes
Have you defined the profile/demographics/characteristics of an ideal lead?	Yes
Do you have a service level agreement between marketing and sales that governs the quantity and quality of leads you need to generate each month? If marketing/sales aren't separate people/teams, do you have a lead quality/quantity goal?	No
Does your sales team connect with your leads via their social media profiles on Twitter, Linkedin & Facebook?	Yes
Do you analyze your results each month so you can continuously improve results?	No
Do you track your traffic sources?	Yes
Do you track which traffic sources convert into leads?	Yes
Do you track which leads convert into customers?	Yes
Do you track the traffic source/marketing campaign for each visitor, lead and sale?	Yes
SEO - down to keyword	Yes
PPC - down to campaign/keyword	No
Email - by campaign	Yes
Social Media - by site	Yes
Other campaigns (Online banner, email sponsorships, etc.)	Yes
Do you track your social media follower counts/reach on Twitter, Linkedin, Facebook, Youtube?	Yes
Do you track comments, inbound links and page views for each individual blog post you publish?	Yes
	Grade 78.5

Evaluation | Inbound Marketing Goals

Find this tool in Additional Learning Resources

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Close the call

Do you feel like you have earned the right to do so?

+

Earn **Trust** &
Confidence

Prospects don't buy on excitement alone

They also need to trust you and have confidence in your ability to deliver.

Tie downs - gain mutual agreement

You do not have a plan until you have client agreement:

- *“Ms. Prospect, do you feel like we have a good understanding of your goals?”*
- *“How do you feel about the plan being able to help you get to your goals and targets?”*
- *“What feels like the most important element of the plan? “*
- *“What do you feel least confident about?”*
- *“How do you feel about our agencies ability to help you meet your goals? “*

If not bought in/confident – back up

Do **not** send a proposal or contract

?

Let’s say you backup but the prospect is still not bought in? What then?

Answer: See next slide!

What if the prospect is still not bought-in?

- **Don't** propose starting with just one piece (i.e. blogging or SEO).
- **Do** consider a fuller planning exercise and **charging** for your time.
  - i.e. Content Marketing Blueprint from IMR**
  - i.e. strategy development (personas, competitor analysis, content plan, etc)
- **Do** consult your CAM for guidance

**More info at http://www.contentmarketingblueprint.com/

If bought in – script on how to book the next call:

1. **Summarize** - *"This has been a very interesting call today. Let's summarize…"*
2. **Recommend a Next Call –** *"I'm going to take back what we discussed and lay out a few options with different activities and price points for us to review together. That way, we can determine what works and what doesn't."*
3. **Budget Qualify** – *"I expect the price points I'll come back with to be between X and Y. If it did, would that surprise you? How do you feel about this price range?"*
4. **Understand Their Next Steps** – *"Let's say we review the options and conclude it is a good fit. What happens after that?"*
5. **Set a Time** – *"Let's put a date and time on the calendar to review what I put together. How is next Wednesday at 3pm?"*

Don’t forget your recap email

1. **Plan summary**
   - Snapshot of the whiteboard and/or your summarized notes
   - Completed copy of the IM Evaluation
   - Additional plan elements (not a full proposal)
2. A few **case studies** links
   - Use HubSpot Signals to see if they were clicked
3. Agreed upon **next steps**
   - Including agreed upon date/time for next meeting

HOW TO RUN THE GOAL SETTING AND PLANNING CALL

- ☑ Begin the call
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3 NEXT STEPS

NEXT STEPS

1. Select an upcoming scheduled Goal Setting and Planning Call
2. Use the Opportunity Review Worksheet (in Additional Learning Resources) to plan for the call
3. Practice going through the Client Funnel Analysis and putting together a plan
4. Review and role play with your CAM

Full training series available at

www.davidweinhaus.com/sas (in beta)

Password: sprocket

Find ‘Additional Learning Resources’ as well

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RESOURCES

1. Client Funnel Analysis worksheet:
   http://cdn2.hubspot.net/hub/37818/file-553699155-xlsx/Client_Funnel_Analysis.xlsx?t=1393514075000
2. Inbound Marketing Evaluation worksheet:
   http://cdn2.hubspot.net/hub/37818/file-557412870-xlsx/IM_Evaluation1.xlsx?t=1393608240000
3. Opportunity Review Worksheet:
   http://bit.ly/OpportunityReviewWorksheet

THANK YOU.

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