

## **Optimize Your Sales and Marketing Process**

### **How to Increase Sales Without Spending More**

Ask marketing people what a company should do to increase sales, and most of them will say that you've got to spend more money on advertising. Or they'll come up with equally expensive, complicated strategies that they think will capture new prospects. However, the reality is that very few companies obtain really good conversion results from prospect names they have already generated. Most of those leads go to waste. The conclusion is inescapable: the route to dramatically improved sales is properly optimizing your marketing and sales process.

**Dramatically improve sales results without spending more on lead generation, advertising or other expensive marketing vehicles.**

What usually happens within a company marketing folks generate the leads and a bunch of names are handed over to sales. This process is problematic, because it implies some sort of magical transition from marketing on the one hand to sales on the other. There must be a combination of sales and marketing directed at everyone in your prospect funnel. On a per-prospect basis, sales effort is almost always more expensive and labor intensive. Marketing provides a better opportunity to exercise economies of scale and move prospects along. then a

Most marketing experts say it requires between seven and nine "touches" before a customer will actually make a purchase, so it's vitally important to design at least this number of communications or repetitions into the process whenever you have direct contact information for a prospect. Lower-cost marketing touches involve a one-time setup cost, followed thereafter by a very low cost per prospect. For example, the automation of marketing through computerized direct mail, e-mail, e-zines and other communications can be a cost-effective, even free, method to educate customers and bring them along in the sales process. E-mail auto-responders, which automatically mail a sequence of communications to

customers every day, every week, or at whatever frequency you prefer, are a tremendously cost-effective way to touch customers without any human intervention. Auto-responders allow you to maintain a “perfect” scheduled contact frequency—there’s no salesperson who might drop the ball due to overwork, vacation or other distractions. By keeping your offering in front of prospects, automated e-mails reduce the education burden placed on your more expensive sales force and “soften the beach” for the time when the salesperson can contact the prospect personally.

Some prospects will require considerable personal contact to move along, but the additional automated contact is not likely to hurt. These extra marketing communication touches can also benefit your consultative sales.

## Sales Funnel Diagram



Companies often have trouble measuring, optimizing and assigning responsibility for the sales process. This task becomes much easier once the sales mechanism is broken down into its respective parts. The

following diagram shows a generic sales and marketing funnel with three levels, designed to be implemented once the prospect has been identified. The three levels are somewhat arbitrary—your company may need a greater or smaller number—but it is usually best to start with a few levels and add more as the company becomes bigger and more people are involved in the sales process. The steps to optimizing your funnel are simple. You’ll start by capturing all the right data in order to measure and improve upon each step. In order for the funnel to be effective, the following questions must be asked at each level:

- 1) How many prospects come into this level, and at what cost?
- 2) What are the key “leaks” (reasons that people fall out of the funnel) at this level?
- 3) What is the conversion ratio for moving from this level to the next?
- 4) What steps or tactics are available to move potential customers from this level to the next (or to eliminate them so expensive resources are not wasted)?

Because of the higher absolute numbers, improvements at the top of the funnel typically have a greater impact than those made at the bottom. Improvements at each level are multiplicative, not additive. A 10 percent improvement in conversion at one level can mean 10 percent more sales falling through each level to the bottom. However, a 10 percent improvement in two levels could mean a 30 percent improvement in sales at the bottom level, depending on your conversion ratios between levels. By doing the math and looking at the cumulative conversion ratio as you move down your funnel, you will begin to grasp the economics of your sales process. Unfortunately, most companies do not have an adequate understanding of these steps and ratios; they do not see the big picture and they can’t measure and optimize the entire process well.

Once you understand the development cycle of each sale better, it quickly becomes obvious exactly how much it costs to get a prospect into the funnel and ultimately move them through each level. This allows you to begin looking at real costs and determine the benefits of alternative strategies. In addition, you will be able to better rate each lead-generation strategy you are currently using and know what can be spent (or offered to partners) in order to bring in leads at each level of qualification. You’ll still need to tag each prospect back to the source of the lead and look at the overall quality of leads from

each source as you compare costs, but the initial decision is made much simpler knowing what your likely revenue from 100 prospects is likely to be.

## **Plugging Leaks**

Identifying the biggest leaks requires contacting a number of prospects who have gone into the proverbial “black hole.” These are the people who have stopped returning your phone calls. You need to find out whether they bought from a competitor, didn’t buy at all, or had a problem with your offering versus your competitors. You may need a sampling system, which could include a reward offer to determine why those who have “leaked out” have lost interest.

Using the conversion ratios described in your sales funnel diagram, you will be able to estimate or calculate the total cost and/or cost per prospect lost on each level. By looking at the cost to get those prospects to the bottom of the funnel and by looking at the sales lost because you didn’t get them to the bottom, you will be able to understand the real cost of that leak in your funnel. Adding more tactics where the leaks are significant and costly will increase sales. This approach allows you to make good decisions about what you should reasonably spend in increased sales efforts, giveaways, special offers or free “air gifts” (i.e. PDF reports) that cost almost nothing to provide to an incremental customer. Simple and effective ways to plug leaks abound. Here are some examples:

- 1) E-mail the prospect a white paper or useful tool that is targeted to that level of the sales funnel. (digital gifts are free!)
- 2) Provide a price quote, discount or limited-time offer.
- 3) Send a direct-mail piece or product sample.
- 4) Call the prospect or send a survey questionnaire; this shows that you are personally involved and allows you to know where he or she is in the cycle. (You may be worried that a personal contact will be perceived negatively, but not all touches need to be purely for the benefit of prospective customers. Prospects understand that you need to learn more about them in order to do a good job.)
- 5) Offer a demonstration, seminar or other educational materials such as a CD or DVD.
- 6) Provide a comparison chart of the features, benefits and/or costs of the various levels of your organization’s products.

- 7) Offer a free trial or other “slippery slope” offer.

As leaks in the funnel are identified, you can think about and invent new strategies, tools and tactics (either in sales or marketing) to reduce the losses at the leaking point in the cycle and increase conversion ratios to the next lower level.

## Moving Prospects Down the Funnel

As you continue to touch the prospects, your brand and the image of your company will be reinforced. By repeatedly hitting this population with your unique selling proposition, you will ultimately get the best prospects to the bottom of the funnel for closing. You should also take advantage of your staff’s ideas to “institutionalize” the best ideas, stories and tactics. Brainstorm with your fill in a “Tactics for Advancement” list for level. You might be a small player in the market, but by the time a prospect is at the of your funnel he will think you are the leader—if you have done the job right and many good-quality touches.

There are only 3 ways to grow your business: 1) More customers, 2) More frequent sales to those customers, 3) A higher average sale.  
-- Jay Abrams

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## Conclusion

In most cases, companies can implement simple strategies that will dramatically improve sales results without spending more on lead generation, advertising or other expensive marketing vehicles. Using simple models to break down the sales equation into its component levels can be a very valuable way to analyze, communicate, measure and improve your business’s bottom line. This optimizing the funnel approach will give you more control over the growth and profitability of your business. You will be able

to predict sales and return on investment (ROI) for multiple scenarios better, allowing you to make smart decisions about marketing and sales budgeting. This “virtuous financial circle” will allow you to scale your business rapidly, without sucking cash and without diluting your shareholders.

Being able to predict your ROI, and maintaining a thorough understanding of your business, will also allow you to easily raise capital for growth. Investors can be shown exactly why their investment (at least the part that goes to sales and marketing) will provide a certain level of revenue and profit growth in the business. Demonstrating the control you have over every aspect of your sales funnel will show prospective investors that you are sophisticated, analytical and understand the economics of growing your business. It will position you at the front of the pack and greatly increase your chances of raising capital in today’s tight capital environment.

You can get rich by being lucky or by being smart—but the harder and smarter you work, the “luckier” you tend to get.

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Of course, if you are successful with this process and have sufficient gross margins you may not need outside capital at all. When this is the case, you and your team will own considerably more of your business at the end of the day. And isn’t that the real reason we entrepreneurs take these huge risks? So start the process of measuring and optimizing your sales and marketing funnel today. It is one of the best ways to add great value to your business without investing more capital and taking on additional risk.

If you are interested in further exploring the sales equation, there are many elaborate sales processes that can take the process of selling to the next level of sophistication. I personally like the Miller Heiman model, presented by Robert Miller and Stephen Heiman in their 1985 book “Strategic Selling,” considered a classic today. This model is for streamlining complex strategic sales in which multiple decision makers are involved and every activity is tracked against each person who influences the decision. This type of system is generally required for sales of \$20,000 and up, but the funnel system described above can apply to almost any low-priced product sale, starting as low as \$50 and going up to any price level. Some sales software, like ACT, Goldmine and [www.Salesforce.com](http://www.Salesforce.com) have these models

built into the software to help manage the process and pipeline better. The problem is usually that the sales people don't use them or there is not an objective standard enforced defining when a prospect is at each level. Lack of consistency across a salesforce can make the data and system totally useless so you need to define this and enforce that convention. Which one you use is less important than having one. Most will allow you to track your pipeline more effectively and improve results over time if used properly.



**HOW TO MANAGE A BUSINESS  
FOR RAPID GROWTH**  
**Optimize Your Sales and Marketing Process**

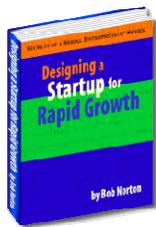
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Competitive Advantage**

All products were developed by our founder, Bob Norton, a serial entrepreneur for over 25 years and a CEO since 1989. Mr. Norton is one of the leading authorities in the world on entrepreneurship, intrapreneurship and growing early-stage businesses rapidly. He has participated in eight startup companies; grown two to over \$100 million in sales and several have dominated their respective markets. He has also worked for two multi-billion dollar corporations running product development efforts. His experience goes across all size companies, and many types of businesses in various industries. During his career Mr. Norton has helped created over \$1 billion in new shareholder value just while at those companies. Mr. Norton provides expertise on growing small and medium size companies more rapidly using eleven different proprietary tools and methodologies for business design, development and optimization, which he has developed over the last fifteen years. Many ideas are also contributed from over 1,000 business books in his personal library. He also runs the premier [CEO and Entrepreneur Boot Camp](#) in the U.S. today, which is design to cut years off the learning curve of CEOs and entrepreneurs and turn them into world-class CEOs. This exclusive event teaches practical business design and optimization systems in an intensive 3-day training program for any CEO or entrepreneur.

Mr. Norton has appeared in Inc. magazine, on CNBC and many other regional and national media. He coaches and mentors both entrepreneurs and experienced CEOs one-on-one, and through consulting, speaking, writing and seminars. He frequently speaks at corporations, associations, and universities on business topics.

These books are targeted at particular problems and stages of development where early-stage ventures commonly encounter critical issues while moving from raw startup with an idea to becoming an established company. They are guaranteed to improve any business's chances of success dramatically. They can be downloaded immediately and the ideas and systems put into action the same day. Unlike hardcover books, that need to be a certain size to justify the printing, distribution and retail markups, these books will not have lots of redundant information, essentially showcasing the same basic ideas five different ways. They are packed with totally unique content that comes from the experience of a real serial entrepreneur, not just an author who did some academic research, but practical advice and systems for CEOs and entrepreneurs proven to work over two decades. The philosophies and systems used in each are compatible so that, as a set, they will create a framework for successful and rapid business growth.

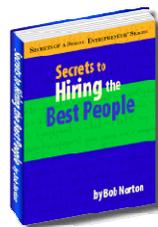
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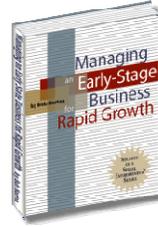
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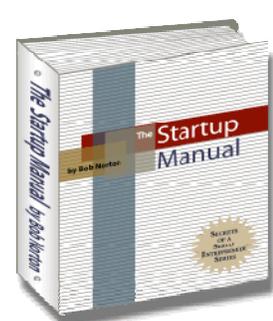
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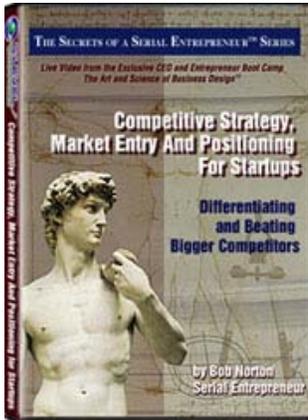
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