

A Comprehensive Guide to Lifecycle Marketing

keap



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Introduction

At Keap, we've crafted a strategic marketing system that countless small businesses have utilized to great success for nearly two decades. It's called [Lifecycle Marketing](#).

"Lifecycle Marketing started as a concept to help us figure out how we can explain to people the problem that our software is solving for them," said Scott Martineau, who co-founded Infusionsoft, which rebranded as Keap in 2019. "It's our attempt, as a company, at helping to explain to small business owners the common problems that they face as they're trying to acquire new customers. Then, we use it to share examples of the strategies that businesses who are most successful use to grow their business."

Rather than working harder, Keap suggests that small business owners looking to grow their companies work smarter by leveraging Lifecycle Marketing, which can save time, energy, and money. After all, growing a business is directly tied to the experience that a company's leads, prospects and customers have had and/or are having.

[See how Lifecycle Marketing can help grow your business by taking the assessment now](#)

For the purposes of Lifecycle Marketing, "marketing" refers to everything that a business is doing to get its unique value into the market. In other words, marketing, sales, and follow-up communication with customers.

The Lifecycle Marketing model provides a simple framework of three key systems that cover the nine phases of a customer's journey. Small business owners can use these systems to design a marketing strategy that will help them attract potential customers, sell to them, and deliver an experience that impresses them and keeps them coming back—with referrals.

"Most businesses are hemorrhaging," Martineau said. "They don't always know this when we start to talk with them, but most

businesses have three significant areas of waste and if they could just plug those holes in their business, they could actually grow without needing to go out and spend a lot more money or even a lot more time.”

The Lifecycle Marketing model was designed to address the aforementioned “three significant areas of waste.” It creates:

- A system for collecting leads — “Collect leads”
- A system for converting those leads into paying clients and customers — “Convert clients”
- A system for taking those customers and creating fans who are buying more and telling friends about you — “Create fans”



“A lot of times, entrepreneurs suffer from ‘shiny object syndrome,’ and when you don’t have a method for categorizing and organizing all of the shiny objects that you see, you end up just spinning your wheels,” Keap co-founder Clate Mask said. “So, one of the things we’ve learned over the years is that Lifecycle Marketing is very effective to get entrepreneurs into organized and systematic action as opposed to chasing the flavor of the day, or that shiny object, or that some promised thing that is going to change your business.”

Justin MacDonald, a former Keap employee who's now thriving as a multiple small business owner thanks, in great part, to Lifecycle Marketing, sees additional benefits.

"Not only does Lifecycle Marketing help you categorize things, you also start to see gaps where you don't have anything happening in your marketing," MacDonald said. "And those are, of course, the holes in the journey where people are falling out, and those are your greatest opportunities to go do something, even something small, that's going to create immediate growth for your business, whether that's in revenue, whether that's in time savings, or whether that's in peace of mind."

Keap is actively introducing Lifecycle Marketing to small business owners [via webinars](#) featuring Martineau, Mask, MacDonald and Keap Inbound Marketing Specialist Jack Smithson.

Related tool

[How to create your own Lifecycle Marketing playbook:](#)

Rolling out a Lifecycle Marketing plan can be done quickly and affordably with easy-to-use automation technology from Keap. Download this playbook and start planning now.

Collect leads

In the Lifecycle Marketing model, there are three phases of collecting leads: Target, Attract, Capture.



Target:

Clearly define your target customer so you understand who they are, why they have pain, and where they go to find answers.

It's imperative that you clearly define your target customer. Investing in identifying accurate targeting within the right channels will help your business narrow down an audience for your niche market and use your advertising/marketing dollars more efficiently, ensuring you're catering to those who will benefit from your business the most.

The best way to define your audience is to create a [customer avatar](#). Here's a great [template](#) you can download that will help you determine what your target audience looks like.

Here's how to create a customer avatar:

Start by asking the right questions around how your product or service will influence or improve the life of the avatar:

1. Where are they located?
2. How old are they?
3. To which generation do they belong?
4. What is their relationship status?
5. What is their highest level of education?
6. What is their job title?
7. How much money do they make in a year?
8. Do they own or rent?
9. What's the size of their family?

The next step is gauging the avatar's interests.

Third, identify the avatar's shopping behaviors.

The most effective client avatars are created with information based on market research as well as information that you gather from your current customer base.

Gathering the most accurate information possible to develop your business avatar can be accomplished by:

- Using surveys to capture feedback from your existing customers.
- Adding a Custom Audience Pixel to your website, which helps small businesses track and learn more about people who have visited.
- Interviewing customers to reveal their motivation behind certain buying behaviors.
- Creating a detailed profile of your ideal customer will yield the optimal ROI with sufficient data based on how they'll respond to the right product at the right time.

A customer avatar will also help you more effectively advertise to your target audience by knowing which social media platforms they use. You can leverage this information to target the right people on the right channel so you know how to create your content and come up with better product placement that will fulfill your customers' needs.

From the experts



“Part of being able to successfully go into the market and collect leads is you’re clear who it is that you’re going after and what the core motivations are that those people have ... If you’re out in the market trying to get your goods and services into the market, and you decide to try to speak to everybody, the reality is when you do that, you’re actually speaking to nobody ... It’s almost as important that we are understanding who we’re not speaking to ... You’re not for everybody, right? Your unique services are designed to solve a particular need ... The ability to say, ‘Well, I don’t need to worry about what all those other people who are outside of my target will think about this or how they’ll react to it,’ that allows you to create this focus on the people that are right at the center of your sweet spot.”

— **Scott Martineau**



“If you’re not clear on who that target person is in your brain, there’s robust ways to do that with research and so forth. And there’s really, really simple ways to do that. It’s kind of a spectrum. And when in doubt, just do the really simple thing, which is, (determine) who’s your best and favorite customer, because your best customer, the one that pays you the most, may not be your favorite and your favorite may not be the one that pays you the most. So which one is your best, favorite customer? Because that’s the one you want to do business with.”

— **Justin MacDonald**

Read more about “Target”

From: [The ultimate guide to networking and connecting with introverts](#)

The goal is to find people you connect with who are open to building a mutually beneficial relationship. They should truly believe in what you do and you should truly believe in what they do. Ideally, they will amplify your business and accentuate your efforts.

From: [5 things I've learned from networking as a service-based business](#)

People often put a lot of pressure on networking. “I must meet a new client or sign a new deal or it’s not worth it!” When we take the “network” out of networking, though, you miss the value of it. As a service-based business, much of our work comes from referrals. The best way to make referrals is to meet people; get to know them, ask questions and be open.

From: [Effective advertising techniques specifically for small business](#)

Creativity is a powerful asset. That’s worth repeating, and its truth must be embraced. But here is the difference between successful advertising companies and professionals: The most effective use of creativity today isn’t in content development with its “faster, cheaper” mantra. It’s in elevating creativity to allow it to influence our entire approach to advertising, including the business opportunities we pursue.

From: [Who is your audience: people or search engines?](#)

Without proper on-page optimization, your awesome content won’t rank well in search engines like Google and, as a result, won’t get the attention it deserves. In other words, you’ll be missing out on the biggest source of free traffic (and leads): organic search result.

From: [Top 10 places for you to find lost leads](#)

What you might not know is that you may have leads hiding among your social media followers. Your social media audience is likely the

most engaged audience you have access to online, and knowing how to target your social media followers by their demographic data will allow you to find those leads and funnel them into your sales process.

Related tool

[How to identify your target market worksheet:](#)

Narrowly defining your target market is an integral part of successful marketing. This worksheet will help you define your ideal client, which will allow you to be more efficient (with your time as well as your finances) in marketing your product or service.



Attract:

Understanding the problems and motivations of their target customers. Launch enticement tools like high value content that address biggest pains/aspirations.

Knowing how to leverage lead magnets to attract prospects will give your small business a competitive edge. This is especially true when you understand the needs and motivations of your target audience, helping you create powerful lead magnets.

The first place you want to start is ensuring your website provides valuable content that will attract your target audience. Some great examples of robust content include:

- Webinars
- Infographics
- Podcasts
- Guides
- Virtual conferences/events
- Visual commerce
- White papers
- Ebooks
- Surveys/quizzes
- Product tutorials and demos
- Easy social media access/icons
- Fleshed out product descriptions with purchase links
- Blog posts demonstrating solid SEO
- Product videos

Entice your target audience to access your content, then collect their contact information with a [submission form](#) by programming an interstitial, or a pop-up, on your landing pages. If the content is gated with a form, the lead will fill out the form to access the enticing content, and their info will be added into your [CRM](#) so you can stay in contact with leads and nurture your relationship with them over time.

Some best practices to apply to your interstitials include:

- Gauging how many fields will be sufficient for initial data gathering. Fewer fields yield more participation. You don't want to intimidate your audience members with too many fields initially, 1-3 typically suffice for the first submission form.
- When asking them to sign up for a newsletter, only start out by collecting their email address.
- Exit interstitials can be more effective than entrance pop-ups, as they won't interrupt the customer's browsing experience and discourage them from spending more time on site.

From the experts



“When you start to think about how to attract people, it's really a mindset. And ironically, the way that you do it, as you get into the mind of your prospective customer, you have to become the master of the problems that those people face. You need to understand them more intimately than anybody else on the planet. You need to be able to speak to them. You need to understand maybe the reverse of the problems that they face or what are their aspirations. And you have to orient everything that you do around that because at the end of the day, collecting leads—growing your list so that you have this audience that you can speak to—it's all a value exchange. People are not willing to give you their information. Giving you my information comes at a cost to me, right? And so ... we give our information to people who are creating value for us ... So that's something that has to be constantly at the back of your mind—what are the problems and how can I go create unique value for the people that I am dealing with in exchange for their contact information, in exchange for taking our relationship to the next step.”

— Scott Martineau



“I think this mindset is so important. It’s one of the key things that I believe enabled our company to grow. The natural tendency for entrepreneurs is to share messages with their audience about our products and our solutions. But that’s not what’s going on in the minds of the customer. They don’t care about our products and our solutions. They care about their problems. So, when we get good at sharing information about the problems that are rattling around inside the minds of customers, that’s when we open a door to create a relationship.”

— Clate Mask

Read more about “Attract”

From: [SEO for beginners building a new website for their small business](#)

For someone who’s just starting an online business or making a website, SEO can be overwhelming without knowledge of the basics. Check out this compilation of SEO tips, tricks and simple hacks that will help small businesses’ websites achieve better search engine rankings.

From: [SEO checklist for a brand new webpage](#)

For every new page that you add to your website, you want to make sure it is optimized for search engines. That’s because your audience may be searching for different things and that landing page you just created is exactly what they need to find. By having a SEO checklist on hand when you develop that new webpage, you will be able to keep your SEO practices and results consistent, helping to draw more targeted traffic to every page of your site.

From: [Why content marketing for small business is key](#)

As a small business owner, now’s the time to grab your audience’s attention by generating an influential marketing strategy to get your

content noticed and drive traffic to your site, whether it's in the form of a blog, photo essay, video, survey, etc. There are so many ideas out there that constitute great pieces of content.

From: [5 tips to increase leads and close sales with video content](#)

High-quality video is right now one of the strongest, more empathetic and effective types of content. In fact, one-third of online activity is spent watching video. On top of that, 73% of B2B marketers say that video positively affects ROI.

From: [Small business video marketing](#)

The popularity of video marketing offers both opportunities and challenges. Its success clearly shows customer demand, but also means that every other business will also be investing in video, making it harder for you to create great content that stands out. But, if you take your time, carefully choose the right type of video content, and understand how you'll promote it, you can make stellar videos that resonate with your customers (and stay within your budget!).



Capture:

Building bulletproof lead capture methods to collect contact information into one central place for later follow-up.

The final step in collecting leads involves carefully strategizing lead capture methods that will guarantee success. Collect contact information and organize it in one central place for later follow up, such as Keap's [client relationship management \(CRM\) system](#).

A CRM will help you be more efficient and impress your clients by leveraging a system that keeps all your business organized with one integration tool.

A CRM like Keap allows you to:

- Create landing pages with webforms so you can capture leads
- Automate messaging and data entry
- Book appointments
- Keep track of invoices and payments
- Help you view and manage your sales pipeline

The first step in lead capture is ensuring your website is relevant and offers value to the target audience. Think of your website as a “lead capture machine,” converting prospects into solid customers by moving them through the sales funnel.

Your website's homepage is where you'll make your first impression. Make sure its terminology is relevant to your target audience and includes SEO keywords they're searching for. [Google's free keyword tool](#), Wordstream, is a robust method for searching top keywords relevant to your industry and location.

You also want to make sure your business' contact information is accurate and easy to find on the site. Do a spot-check every so often to see if images and links are relevant and directing customers to the correct place.

If you're going to attract leads by enticing them with a special offer, make sure it's not open-ended. Make it as specific to your target audience as possible so the visitor knows exactly what they're getting and your business doesn't appear too impersonal. Ensure that your content is compelling enough to prompt your visitors to relinquish their contact information willingly and be excited about doing it, knowing they will get something great in return.

Learn how Keap can help you collect more leads and grow your business by checking out our product demo. Keap will help you organize all your customer information in one centralized place, making it accessible to your whole team. Never let another lead slip through the cracks again. Generate more leads, more clients and more growth than ever before.

From the experts



"My passion as a co-founder and CEO of Keap is to help small businesses grow. What I know is that they're going to grow by making sales. They're going to make sales by having relationships with people, and you can't have relationships with people unless you're adding contacts to a database and having a way to communicate with them. So after nearly 20 years of running this business, and seeing all of our customers' databases, what we know is the businesses that grow are always adding contacts. And so my plea to entrepreneurs who want to be successful, who want to grow their businesses, notice that it's as fundamental as simply always adding contacts. When you do that, you are in the game, you've got relationships that you can nurture. When you don't do that, you're trying to create something out of thin air. And the thing that always astounds me is that entrepreneurs are constantly bumping into contacts, but they don't have methods for capturing them so that they can begin to build relationships."

— Clate Mask



“Evaluate all these different types of contacts that you’re interacting with and where they are interacting with you, and make sure you have specific intake processes for them ... What would it mean for you in your business if you had a completely solid bulletproof lead intake system for all the places that you’re interacting with people. Number two, if you were systematically tracking the details of each of those clients, you and your team, so you always were on the ball and showing up as somebody who actually cares for them. And third, if you had this list that was always growing segmented so that you could very easily speak to people, the right group with the right message, what would that represent for you and your business? That’s really what we’re trying to get after is what the impact can have on your business as you put these systems in place.”

— **Scott Martineau**



“Segmentation is, I think, one of the most important things when you think about capturing contacts because a contact is just a human, but the relationship that human is going to have to your business is going to vary depending on who they are and your ability to communicate with them. So, this is where a tool like Keap and Infusionsoft is supremely powerful because it allows you to have relevant conversations, relevant follow-up, make relevant offers and relevantly target that audience when you want to get a message in front of them.”

— **Justin MacDonald**

Read more about “Capture”

From: [Turn visitors into leads](#)

Lead generation isn't a new way of bringing in new business. It's been around for a while. But, changing trends and changing behaviors and interests across generations means you have to keep your ear to the ground to make sure your lead generation strategy is on point and right for your business. Even if you have a strategy in place, it may not be as effective as it once was and needs to be reevaluated.

From: [The small business guide to capturing leads](#)

The leads you worked so hard to attract are now clicking around your website, thinking about whether or not they should become a client. And then, many of them vanish without a trace. If those website visitors don't turn into buyers, you may never know who they are, how to contact them, and what you could have done to follow up and earn their business. That's why it's important not only to attract leads but also to capture them—ideally, by using a lead magnet.

From: [Lead generation best practices](#)

Ah the lead generation form, you know the one, that interstitial that pops up on a website when you try to navigate away from the page. It's not there to inconvenience you, it's there for a very important reason—companies want to get to know you better by asking for information from you in exchange for the content they're providing.

From: [8 proven methods for using lead magnets](#)

Lead magnets are aptly named because they are exactly that—magnetic offers which attract leads to your business. You might offer an infographic, a form or template or an informational ebook. Whatever the form your lead magnet takes, consider the variety of methods available for using lead magnets to attract prospective leads.

From: [6 critical steps for collecting business cards](#)

Even though technology has made it incredibly easy to connect with people online, there is still a real world out there where people meet face-to-face and swap information via networking and business cards.

Related tool

[How to turn leads into customers:](#)

In this free on-demand webinar, Ryan Deiss will show you how to maximize profit through email marketing using his concept of “The Ultimate Game Plan.”

Convert clients

In the Lifecycle Marketing model, there are three phases of converting clients: Engage, Offer, Close.



Engage:

Clearly define your target customer so you understand who they are, why they have pain, and where they go to find answers.

This is where you get to educate your buyers about your products and services. It's up to you to guide them properly so they look to you as a business they can trust. Instill the confidence in your customers that creates a monopoly in their minds so that they only associate the product or service they need with your business when it is time to engage. Some indicators that they're ready to take action include:

- They visit pages on your website
- They interact with the content that you're distributing
- They open an email and read it
- They respond to emails
- They click links in emails
- They request a consultation
- They schedule appointments
- They call or text you or actually respond to a form of outreach

You also want to practice lead nurturing, which involves listening to what potential customers need, providing valuable information and addressing their questions and concerns. Be an advocate for your customers, make it clear you're putting their needs first instead of just trying to make a profit.

Subtly educate and increase awareness of your product or service through informative emails and by providing access to valuable resources or tools such as product demos, how-to videos, white papers and ebooks.

Building credibility with your customer base is invaluable, as it will create a robust influence on the prospect that is still in the decision-making phase and will need information on a topic or product they're not familiar with yet. If your company can be the one that provides that education, not only will it give you a competitive edge, your prospects will remember you and appreciate you for it. Your goal is always to be top of mind in your industry.

From the experts



"You want to create a monopoly in the mind of these leads who aren't ready (to buy) now, so when it comes time to make the decision, there's nobody else on the planet that they would think about except for you and your business. And you can't legally or probably practically create a monopoly in the market, but that doesn't actually matter because what you can do is create a monopoly in the mind of these leads, and then (they) say, 'Why would I go anywhere else except for with this place? I have somebody I trust, they have the information I need, and when the time is right, I'm going to go with them.' So, that's how I frame out the thinking of it."

— **Scott Martineau**



"You want to make sure you have a new lead play in place, and that's a sequence of steps, message and mechanics—maybe it's email follow-up, maybe it's a phone call, it can be a handful of different types of mechanisms that make the most sense. You might tag somebody on social media, there's a few different things, but typically you're going to get some sort of follow-up there. So a new lead play is the primary thing, and it should be relevant to the thing that they opted in for."

— **Justin MacDonald**



“When we put a message out there, you’re going to have a bunch of people who are interested, but they’re just not saying anything right now. And we make the mistake of thinking, ‘Oh, well, they didn’t say anything, so they’re not interested.’ That’s not the case at all. They’re busy doing other stuff, their timing’s not matching up with our timing ... The entrepreneur all too frequently concludes ‘Oh, yeah, they’re not interested.’ No, no, they’re busy, they’re doing other stuff, and so that’s why the engagement and the continual follow-up, this nurture is so important ... I just want to share that for nearly 20 years, this has been the sweet spot of our business, this helping people convert leads and follow-up ... I’ve said over and over and over, over the past decade and a half anyway, follow-up works. If you just follow up, it is the crucial difference between small business success and small business failure. If ever there were one silver bullet, it is follow-up.”

— Clate Mask

Read more about “Engage”

From: [How to plan for a long-term email nurture](#)

One of the most common mistakes small business owners make when it comes to automating their communication is not implementing a solid email nurture sequence; not everyone needs a long-term sequence, but if you want to create a sustainable long-term business, ensuring your leads and prospects keep you top-of-mind as they get closer and closer to saying “maybe” and then “yes” to your products or services, then this is an absolute must.

From: [The simple guide to writing marketing emails](#)

Email marketing routinely provides some of the best ROI for marketers, and has for as long as anyone can remember. In fact, 59% of marketers report that their email campaigns outperform all of their other digital marketing efforts in terms of ROI, so it’s no wonder that they are the mainstay of the industry.

From: [Small business guide to conducting webinars](#)

Webinars have proven to be an effective way to generate quality leads for many marketers. In fact, a reported 60% of marketers use webinars as part of their content marketing programs. However, creating an effective webinar requires a lot more planning and hard work than writing a blog or an article. For a webinar to be productive, marketers need to interact with the target audience beforehand and create buzz about it.

From: [6 tips to time your sales calls 'just right'](#)

Sometimes, it's not about how you do it but when you do it that makes all the difference. One of the key considerations when making calls to business prospects is timing it when they are most likely to give you positive feedback and undivided attention.

Related tool

[10 emails you need to follow up the right way:](#)

Use these free follow-up email templates to save yourself time coming up with email messages whenever you're corresponding with prospective clients about scheduling a meeting and following up after a meeting.

**Offer:**

As leads engage, present offers that align to your clients' needs, and lead them to the most natural next step.

Depending on your industry and your prospects' behavior during the engagement phase, it's important to get clarity on the most critical steps in your sales process and make sure they align with what your clients' needs are.

Once that has been established, it's time to present your offer. One common misconception about presenting an offer is that you're going to "ask them to buy." In the context of Lifecycle Marketing, not all leads are created equal. In other words, it's imperative that you be mindful of where they are in your sales funnel as to which step they want to pursue next. You want to make an offer that's the next best thing for them by thinking about what the key milestones are in your sales process.

You're solving the prospect's problem so it's compelling from that standpoint, but you want to make it really exciting and enticing for them to do business with you. You have to do all the work leading up to this so leads know, like and trust you. If you make an offer and they don't trust you, it might come across as flat or generic. Don't overlook the importance of making a really compelling offer that makes it a no-brainer for your prospect to want to do business with you.

Start stacking value by adding offers beyond what the normal price would be. Make it more compelling by associating timelines or urgency/scarcity with the offer. Supplement it with social proof where customers are attesting to the great value you've created for them with reviews, comments or testimonials. All of these things make it more compelling for your prospect to be emotionally engaged in what you're doing that inspired them to take the next step.

Again, offers are not just to buy; you're selling to people and making offers to them along the way. What will it take to get them to:

- Subscribe to your list?
- Engage in your [emails](#)?
- Schedule a consultation?

Be clear that you're trying to build the value around why they should meet with you for a consultation.

Your offer presentation is the most important step of the sales cycle. In this phase, it is your job as the business owner to showcase your product or service in an informed, professional way that establishes you as the expert in your niche. What sets you apart from others in your industry? Why should your business be the one your prospects trust going forward?

As your leads express more interest in your product or service, present an offer so compelling that it naturally leads them to the next step, which is closing the deal.

From the experts



"Once you have a lead that sort of bubbles up out of the crowd you want to make sure you never, never drop the ball or have holes and cracks in your funnel that allow those leads to slip through the cracks ... There's obviously a lot of reasons why people choose to not accept a quote. But we definitely want to make sure we have a system that can adapt to each of these key milestones so that we always know where somebody is and what actions we need to take in order to move them to the next step ... In terms of lead tracking, just like we have a bulletproof lead collection system, you've got to have a bulletproof hot lead tracking system, so that we can avoid any of the people slipping through the cracks. Obviously, inside of Keap, we built the software to essentially

implement Lifecycle Marketing in your business. You obviously don't have to use Keap, even though we think everybody should."

— **Scott Martineau**



"A lot of times, when we're making offers, we can get a little bit vanilla and we don't make it compelling enough for our buyer. So I think there's a concept of stacking value when creating an offer that makes an offer very compelling, to where the person considering your solution is engaged emotionally because they're getting a good deal, they're getting something that makes a lot of sense to them. You're solving the problem, and so it's compelling from that standpoint, but you're making it really exciting and enticing to do business with you ... Now, you have to do all the work leading up to this so that they know, like, and trust you. If you just make this compelling offer, and they don't know, like, and trust you, it might come across flat, or worst case, it might come across as a used car salesman or something. If the used car salesman made an amazing offer to you after building a great relationship, you wouldn't think of it in that schmaltzy way. When there's no relationship building, it just comes across like, 'Whatever. I don't know, like, and trust you.' Sometimes people look at an offer, and they think, 'Oh, that comes across too sales-y.' No, it should be something that's really compelling and exciting after they know, like, and trust you because of the relationship building you're doing. So, don't overlook the importance of making a really compelling offer that makes it kind of a no-brainer for your prospect to want to do business with you."

— **Clate Mask**

Read more about “Offer”

From: [Common habits for how to win in sales](#)

Gaining a winning sales strategy is not a birthright, it is a skill. It's what salespeople do beyond selling that makes a difference in closing a deal. It's the fixed behaviors and established routines of a salesperson that lay the foundation of their successful work ethic and business strategy.

From: [A complete guide to sales follow-up](#)

Just because someone joined your mailing list or took a quiz you created doesn't mean they will become a customer. You'll probably need to communicate with them a few more times to convince them that your product can solve their particular problem. Statistically, you want to push for five refusals before you give up on making the sale. And if you need to keep going until you get a “yes” or five “nos,” well, that means you need to hone your sales follow-up technique.

From: [How to convert online sales by adapting your message](#)

For a small business, selling products online is an awesome way to drive sales and reach new audiences, but many businesses experience disappointing online sales. This is because they mistakenly assume that selling stuff online is like selling stuff face-to-face, which just simply isn't the case.

From: [Create unique customer experiences with ecommerce](#)

With so many ecommerce businesses appearing online, it's imperative that retailers offer unique online experiences for customers to ensure continued conversions. Shopping has never been easier, as one can just lay in bed with their phone and look through everything that ecommerce sites have to offer ... That being said, the competition among ecommerce businesses is fierce, making it more challenging for ecommerce sites to attract and retain customers.

From: [Business proposal ideas and free checklist](#)

A contract proposal is a written document sent by a business to persuade a potential client to choose that business. They can be solicited or unsolicited, as long as they pertain to the prospect's business and needs. While it may be advantageous to proactively submit a contract proposal to a prospect unsolicited, it has a higher chance of being ignored by the prospect. When a contract proposal is requested through an RFP, however, your prospect is actively looking for the kind of solution your business provides.



Close:

Streamline a simple process for clients to purchase from your business by implementing tactics that align with your sales cycle.

When it comes to closing a deal, reduce and eliminate friction in this process as much as possible. Closing the sale is more than a transaction. The close involves clear communication, good presence and written documentation. It's always valuable to provide your leads with a robust paper trail of your correspondence and payment history.

Streamline a simple purchase process for clients by implementing tactics that align with where they are in the sales cycle. Action is driven by emotion and belief—it's about identifying their needs and pushing solutions through in different ways to get them to move in the direction that is relevant to their customer journey.

When you're presenting a proposal, it should be an easy decision for leads to accept said offer because you've already built that trust and given them a reason to be excited. Keep it simple by sending them a link that includes a call-to-action (CTA) such as 'Click here to make payment.'

In your proposal, summarize your business' strengths by emphasizing how your product offering is different from and better than that of your competitors. Focus on the main objectives you and your client focused on throughout the sales process and demonstrate how your proposal meets their needs and solves their problems. Ensure it addresses the reason the lead signed up in the first place. This is your opportunity to shine as a valuable solution for your leads that will convert them into devoted brand ambassadors.

With automated tools such as [Keap's CRM](#), you can collect more leads and convert clients in the most efficient way possible by:

- Setting up automated sequences to follow up with leads at the right times based on their actions.
- Sending offers at the right time in the lead journey through automation.

- Automating your sales process so you have a set cadence for how and when to follow up with leads in your pipeline.

From the experts



“If you’re following up with somebody quickly, you probably have a five to 10 times higher likelihood of converting them than if you were to wait for a couple of days. A lot of times, we get busy, we don’t have a good system, we’re using sticky notes, right? And we don’t do the things that are responding to people, and we’re not attacking that speed to lead ... When people are interacting with you, are you taking advantage of that? If they send a text, are you getting back to them quickly? So, having a system to monitor that is really critical ... In terms of closing, it’s really critical that you reduce and eliminate friction in this process. What I mean by that is, you need to be really clear about anything you’re doing in this sales process. When somebody gets further and further down your funnel, they should have zero friction. It should be smooth sailing toward the sale. For example, if you’re giving somebody a proposal, it ought to be really simple for that person to accept the proposal and let you know that they’re interested. If you’re going to ask somebody to actually pay you, it ought to be really, really easy for them—you shouldn’t be sending them a PDF of a word document and having somebody send you a check. The days of that type of friction, I think, are just well beyond. It’s got to be something super simple like ‘Here’s a **link**, **click here** to give us your down payment, **click here** to make payment.’ You’ve got to eliminate your friction, so that we get smooth sailing to the sale.”

— Scott Martineau

Read more about “Close”

From: [The ultimate guide to finance and payments for small businesses](#)

When starting a small business, entrepreneurs are worried about things like financing their venture, coming up with a marketing plan, hiring, operations, and other important tasks. Rarely do they stop and wonder, “How am I going to accept payments from my customers?” The list of payment options is expanding all the time. It’s important to keep up with the times and meet customers where they are, both in terms of location (online or offline) and in terms of what payment options they’re using from a technological standpoint.

From: [6 ways to make payment easier for your clients, online and off](#)

If you want to sell more—offline and online—you’ve got to make it easy for your clients to buy from you. That might sound simpler than it is, but if you’re not hitting your sales goals, you may be unintentionally making it harder than necessary to buy.

From: [10 small business invoicing mistakes new small business owners make](#)

Seamless small business invoicing, especially for new businesses, can be the difference between smooth business operations and having to resort to expensive loans, maxing out credit cards, and other sub-optimal financing options that make it easy for you to fall into increasing debt. If you’re a new small business owner, you might not recognize just how important the invoice itself is to getting paid. Here are 10 small business invoicing mistakes start-up owners make, and how to avoid them.

Related tool

[10 emails you need to close a sale:](#)

Use these free email templates as a starting point for the messages you send to prospects.

Create fans

In the Lifecycle Marketing model, there are three phases of creating fans: Deliver, Impress, Multiply.



Deliver:

Make sure you've systematized your delivery, so that clients consistently and automatically get what they were sold.

Once it has become apparent that you've accumulated some life-long customers, you need to ensure you've systematized your method to deliver services so that clients consistently get everything they were promised.

When it comes to business relationships, sometimes it's not always about the sale, but the interaction and the trust that is built between the customer and the agent/retailer/owner, etc. It's also not just about the products, it's about the education behind the products and services. Delivering education on how your business can change and improve your customers' lives is just as valuable as the product or service itself.

Strive to become that advocate for your customers, be the company they can turn to when they're looking for reliable customer service and quality products. Be the company they turn to when they have a huge problem that needs to be solved.

For example, before Infusionsoft, [Hear and Play](#) struggled with purchase order inaccuracies due to non-integrated ecommerce and email systems. It wasted a lot of its valuable time fixing incorrect orders. With Infusionsoft's all-in-one platform, it consolidated its sales, marketing, and ecommerce tools, and started sending personalized messages based on behaviors and attributes. Its customer lifetime value grew by 300% and repeat sales increased by 80%

From the experts



“Creating fans is all about the experience that we’re giving our customers now that we’ve converted them. And quite honestly, this is such an important place to focus. A lot of times we lose focus on this because of our focus on ‘Collect leads.’ It gets ignored, especially after we’re done fulfilling and after they have made final payment. We kind of go back to ‘Start over.’ It’s like, ‘OK, let’s focus on collecting leads again.’ And there’s quite literally work to be done ... and honestly, money to be made in ‘Create fans.’”

— Jack Smithson

Read more about “Deliver”

From: [Do you know what your clients expect from you?](#)

While customer service is important, it’s no longer just about customer service. Consumers have come to expect excellent service before they become a client and while they’re a client. They pay attention to how you interact with them and the details that go into providing them with excellent service because they want to buy from people they feel like they can trust and develop a relationship with.

From: [The advantages of improving customer experience](#)

Regardless of the industry you’re in, improving the customer experience is the key to increasing retention, satisfaction, and sales. The benefits of good customer service take many forms but the best is its impact on your bottom line.

From: [The ultimate client support tools](#)

The challenges of providing outstanding service are many. And as a small business owner, chances are it’s overwhelming to keep track of and respond to client inquiries in a timely, accurate and delightful way. There is no shortage of tools out there to try and help you

streamline and manage your client support workflow. That's a good thing. But it can be pretty difficult to know just where to turn and what will work best for you.

From: [How automation benefits you and also your customers](#)

In many cases, automation is worth the investment, and it often brings more than just efficiency. It can also help you build better relationships with customers, improve your bottom line, and allow you to return to the more enjoyable parts of your job.



Impress:

Create intentional plans to go above and beyond with every client, consistently. Leave a mark that keeps them coming back for more.

This is your chance to go above and beyond for your customers. Not only will running your business through a CRM like Keap's help you maintain organization and efficiency, but it will make it easier for clients to work with you, keeping you reliable and approachable.

Some ways to improve the customer experience and really impress your clientele include:

1. Making subsequent interactions just as smooth as the first—keep your standards consistent so your customers know what to expect every time and can associate your brand with top-notch service.
2. Finding every possible solution—you're there to solve their problems, so it's important to become a master of troubleshooting. If one product isn't a good fit for the customer, try another. If nothing works, don't force the issue or make them feel pressured.
3. Eliminating unnecessary delays and poor communication habits –if someone calls your place of business and you know you're going to have to place them on hold, offer to call them back instead of making them feel neglected. If an item is going to be delayed, send a courtesy message to the customer letting them know and offer to waive the shipping fee.
4. Giving your customers a seamless experience—customers always want a hassle-free experience when doing business with you, make it as pleasant as possible while trying to fulfill their needs.
5. Letting your personality shine through—hold your entire team to a certain standard of customer service, even if you, as the business owner, are not there. Make it so no one ever has to ask to "speak to the manager" because something went wrong.

To give your business a competitive edge, you should always aim to do something unexpected beyond good customer service. If you're a realtor, surprise your clients on their one-year anniversary of living in their home with flowers and a card. Or record all of your customers' birthdays in your CRM and automate birthday emails to be sent out.

In the case of [Burleson Orthodontics](#), they leveraged Infusionsoft's pre-set actions to initiate reminders for staff to send greeting cards with thoughtful gifts at key points in treatment. For example, after a patient has braces put on, they receive a gift card for a smoothie to help soothe any discomfort. And after braces are removed, the patient receives a gift card for a free caramel apple.

You can also implement loyalty programs for your most devoted customers to keep them coming back.

Loyal customers, also known as brand ambassadors, are spending money with your business regardless, so why not have a loyalty program in place? It can also impact the way they consume and how frequently.

It's also important to add incentives and upgrades throughout the duration of a customer's loyalty program to increase the likelihood that they will remain loyal to your brand. For example, if they've spent a certain amount or accumulated a specific level of points, upgrade them to gold status.

From the experts



"Attracting a new customer is five times more expensive than retaining and expanding the lifetime value of existing customers. So what does this mean? It means that the people you've already sold to are way more likely to buy from you again ... You have been told, 'Hey, people buy you. They're not buying your service or your product, they're buying you.' Well, they're buying both. They are buying you, and people you've already sold to have already bought you. So you don't have to sell you again ... We think of marketing as something we do to get people in the door or get people interested, but really we need to market to them throughout that whole lifecycle, which is why we call it Lifecycle Marketing. We've got to market to them after acquisition, after they've purchased, to get them to purchase again. That can make a huge difference ...

So focus on improving onboarding to boost customer retention and recurring business.”

— Jack Smithson

Read more about “Impress”

From: [How to impress and keep your customers](#)

While good customer service is what helps mitigate issues with customers, resolve problems quickly, and keep patrons happy, amazing customer service gets customers returning to your business again and again. And it's only wow customer service that instills a feeling of loyalty and compels customers to refer their friends to you.

From: [5 ways service businesses can wow with better customer service](#)

A recent study concluded that 72% of U.S. consumers are willing to spend 16% more to do business with companies that deliver excellent service. Couple that with the fact that it's anywhere from five to 25 times more expensive to acquire a new customer than it is to keep a current one, and it's plain to see just how lucrative it is for a business to make and keep happy customers. Nowhere is this more important than in service businesses where how you treat your customers is your business.

From: [Effective use of surveys for your small business](#)

Good small businesses listen to the concerns, suggestions, and demands of their customers. But the best small businesses take that feedback and implement essential changes to meet the needs of their customers. This is where customer surveys come in. Without a customer survey—one with clear, well-written questions—you won't know what your small business is lacking and what changes need to be made to better serve your customers.

From: [How CRM software can help resolve customer disputes](#)

The right Customer Relationship Management (CRM) software doesn't just nurture leads and track prospects—it can also help you resolve customer disputes before they cause damage. Small business owners know better than most that a customer dispute is more than a thorn in the side. Even when they're not serious, complaints can lead to bad online reviews and a lack of referrals, both of which can hurt your bottom line.

From: [How to handle an angry customer](#)

Customers nowadays tend to take the more impersonal route and leave negative comments or reviews on social media or sites such as Yelp or Google. Being equipped with a few strategies for how to handle angry customers will help you smooth things over very quickly. Moreover, you'll be better prepared to communicate with your angry customer and help them get what they need so they can possibly turn the experience into a positive review, which is a PR and marketing win.

Related tool

[How to stay motivated and achieve small business success:](#)

This guide will help you understand what qualities clients value in a business and provide you with tips on how you can deliver a better customer experience.



Multiply:

Guarantee repeat business, positive reviews, and customer referrals by intentionally planning each into your customer journey.

Encourage referrals by creating incentives for customers and partners in an effort to grow your client base.

Set up a customer referral program in the following ways:

1. Know what type of referral you're looking for—there are different levels of referral systems, gauge which one is most appropriate for your business:
 - Asking a customer for contact information of someone who might be interested in doing business with you
 - Asking a customer who discusses your business with the potential referral and can attest if they're interested in learning more
 - Asking a customer to introduce you to the referral or arrange a meeting
2. Develop a system—either request a referral on an invoice or send a referral link in a confirmation email.
3. Time it right—figure out the best time to ask for a referral and make it part of your sales and customer service process.
4. Pick a reward for customers that matter—understand what motivates your customers to give you a referral, and then design your program to provide rewards addressing their motivation. Don't just send a generic gift card, make it personal. Leverage upsell or cross-sell items as rewards and incentives for referring a friend.
5. Create a referral landing page—make it simple for your customers to find where they can leave reviews, testimonials and referrals. Include a link to the landing page on the purchase confirmation or send it in a survey a few days after the product was delivered.
6. Bring the program to your customers' attention—your customers may not even be aware this program exists. Direct them to it with a call-to-action in your next email campaign or add it to the main navigation bar on the homepage of your website.

7. Follow up in a timely fashion—build a timeline or set up alerts in your customer referral program so you know exactly when to follow up on a referral so a hot lead doesn't go cold.

Let Lifecycle Marketing help you stand out from other businesses in your industry. Above all, you want your customers to be satisfied and enthusiastic about doing business with you every time they call, click on your website or walk into your store. They are your biggest cheerleaders; they are the ones who will ensure your business stays open for a long time.

With Keap's CRM, you can create processes for delivering great service that will amaze your customers. Leverage automation for upsells, repurchase reminders, and requests for reviews and referrals.

Keap also enables you to automate the process of sending surveys to customers after their purchase as well as a request for a review or referral to highly-satisfied customers.

From the experts



“When your customers are successful with your product or service, and are thrilled with your services, they're far more likely to talk to other contacts or to their friends about you. According to Nielsen, more than 92% of consumers base their purchase decisions on peer reviews. So word-of-mouth marketing and referrals can drive serious revenue for your business. Consider also that, according to McKinsey and Company, as much as 50% of purchases are influenced by the recommendations of somebody else. So word of mouth is valid. It's a real thing ... If you have great customer onboarding or if you're focused on customer experience, people will talk. They just will. They will talk about how great your products and your services are, how great you are, how much you care. And then they'll serve up their friends. And everybody that is using one of your products or services knows somebody else that can benefit from your products or services. So that really good customer experience, or the focus on customer experience and customer onboarding, will create more of this word of mouth.

The really cool thing is that these are leads you're not paying for. Word-of-mouth referrals, those are leads you're not buying. And that's a big deal."

— Jack Smithson

Read more about “Multiply”

From: [Customer retention strategies](#)

Whenever you gain new customers, you should focus your attention on nurturing that relationship to build customer retention and loyalty. Customer retention encompasses all the actions and efforts that go into earning repeat customers. It is different than customer acquisition or lead generation because you've already converted the customer. Your job now is to ensure that those existing customers continue to buy products or services from your business.

From: [Referral psychology: what motivates customers to refer a friend](#)

The most ideal and organic way to grow your business is by referral. Success in any industry can be attributed to “who you know” or “word of mouth.” Once companies understand the motivation behind what constitutes a successful customer referral program, they can implement a solid incentive program that will encourage their customer base to spread the word sans hesitation.

From: [The ultimate guide to better referrals](#)

As a business owner, happy customers are your secret weapon. Referral marketing is a low-cost (or even no-cost) way to get more business from your existing customers. Even getting more business from existing clients can help you sell your product or service, build trust with new leads, open doors to new opportunities, give you meaningful feedback, and point out areas of improvement.

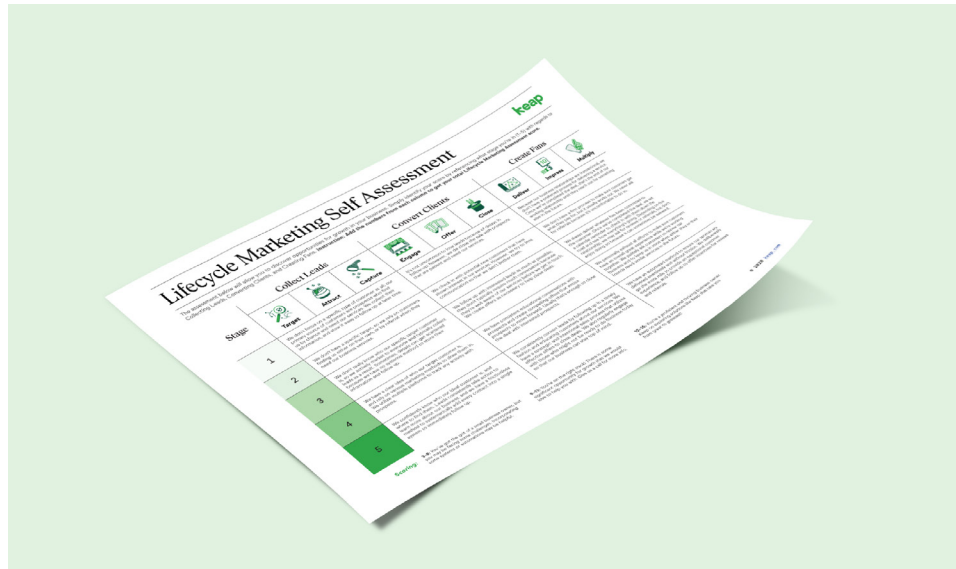
From: [Unique ways to showcase customer reviews on websites](#)

When it comes to the validation of your business, positive customer reviews hold just as much substance as the revenue you're bringing in. They represent success, customer satisfaction and hopefully, longevity. The second best aspect of positive customer reviews? They're a built-in marketing tool.

Related tool

[How to ask for referrals:](#)

Gaining referrals can be one of the most effective strategies for acquiring new clients and growing your business—as long as you ask for them. If you're not sure how or when to ask clients for referrals, this free tipsheet will help you proactively ask for referrals.



Take the assessment

Keap encourages all small business owners to take the [Lifecycle Marketing Assessment](#) to evaluate their business across the Lifecycle Marketing framework. Completing the assessment should take less than 10 minutes, and doing so will provide compelling insight that will resonate for a long, long time.

“I guarantee that when you go through this assessment process that you’re going to quickly see areas of opportunity and waste in your business,” Martineau said. “Along the way, we’ll be arming you with suggestions and strategies for what you can actually do in each of those areas where you want to put focus. This will require you to have a systematic thinking about it, and you’ll have to pick a strategy you’re going to put into place, but in many cases there are strategies that are super-low cost. Some of the raw material is already sitting in your business, and the Lifecycle Marketing framework will help you uncover that.”

MacDonald encourages fellow entrepreneurs to approach the assessment with a relaxed mind.

“It’s not a final exam or an SAT score, it’s really here to serve you,” MacDonald said. “It’s a guiding prompt to have you go through sort

of a self-discovery, to reflect on your business in this framework; so be merciful, and be honest, and hopefully what it does is it creates moments of clarity, and a little bit of that helpful anxiety of 'Oh my gosh, there's waste right here,' or 'There's a gap right here,' and you transform that into opportunity. I'm confident what you'll find is something will be so clear and so compelling that you realize, 'I need to cancel my plans for this afternoon and go put something in place that addresses this thing right now,' whatever that area is. And that would be an amazing step forward."