



WE PUT **CREATIVITY** TO WORK.

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# Sales Enablement in the Advanced Digital Age

## How to Integrate Sales and Marketing

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December 2016



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# Spearhead Helps Companies Grow One Relationship at a Time

We show up every day with a passion for developing relationships on behalf of our clients. It's important because relationships create opportunities. Opportunities turn into sales, profits and healthy growth. When that growth is managed wisely, everyone wins including company owners, managers, employees, contractors and suppliers. The ripple effect on their families and their communities brings meaning to our work.

We automate those things that are most critical to a healthy business, like relationship development and sales. Ironically developing relationships and converting sales is often the least automated area of most companies. We're on a mission to change that.

Automation alone doesn't produce results. It needs to be injected with creativity and professional communications. The marriage of creativity and automation is the heart of our slogan – **"We Put Creativity to Work."**



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# Integrating Sales and Marketing

1. Sales contributes to marketing content.
2. Marketing content attracts interested sales leads.
3. Lead follow-up sequences are automated with content and notifications to/from sales.
4. Content is both digital and print.
5. Campaigns leverage many channels (Google, Social, Press, Web, Blog, Guest Blog, Print Ads, Trade-Shows, Speaking, Direct Mail, etc.)



# Some Things Never Change

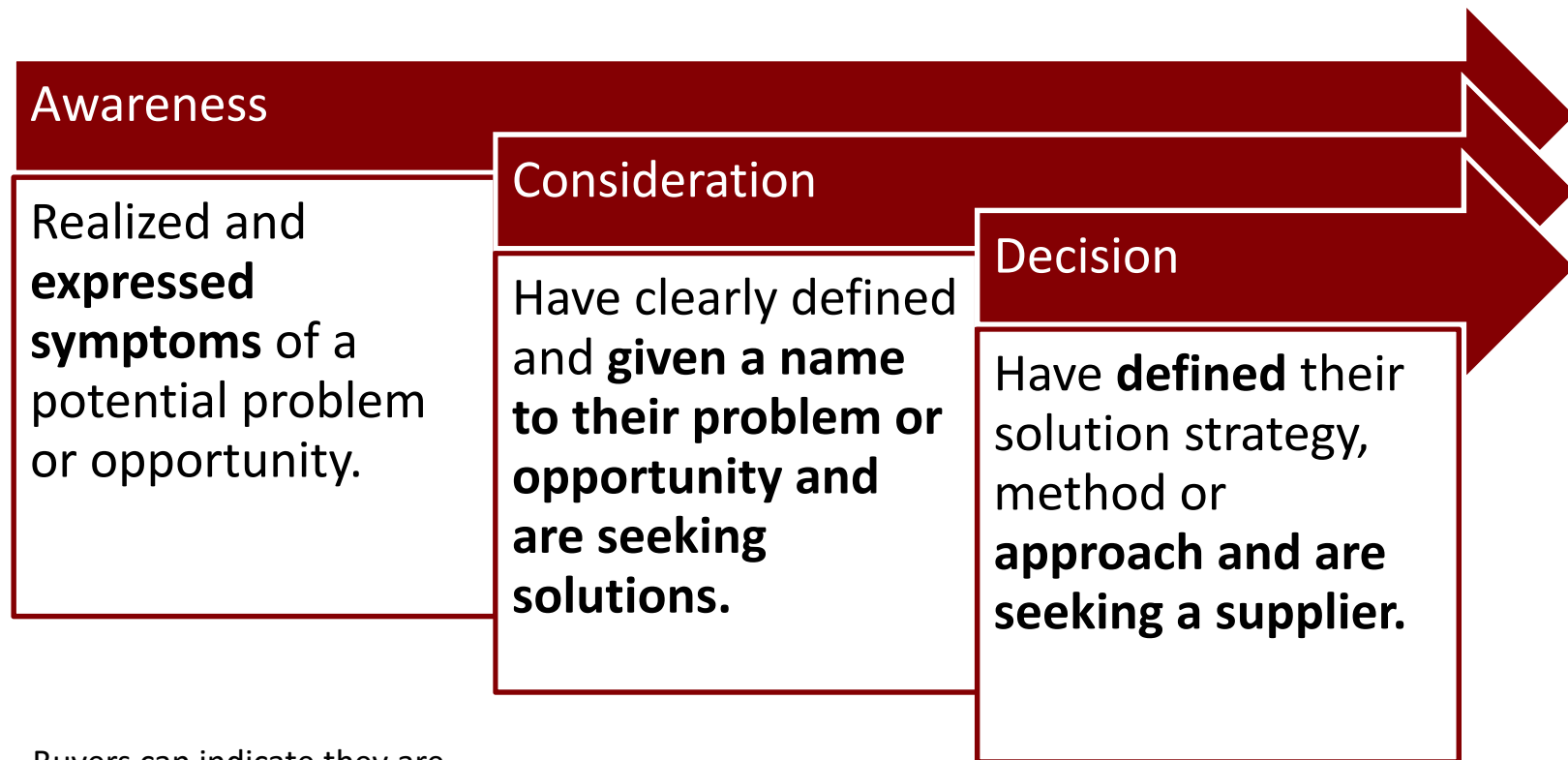


Just like in manufacturing, we know that systems can be created and continuously improved upon.

The fundamentals that these systems are built on are as fundamental as natural human relationships.



# There is a Natural Buyer Path...



Buyers can indicate they are in a stage and yet simultaneously be rethinking their problem, potential solutions and even their supplier choice.



# Some Things *Have* Changed



# Interest 1<sup>st</sup>, Fit 2<sup>nd</sup>

## Interest

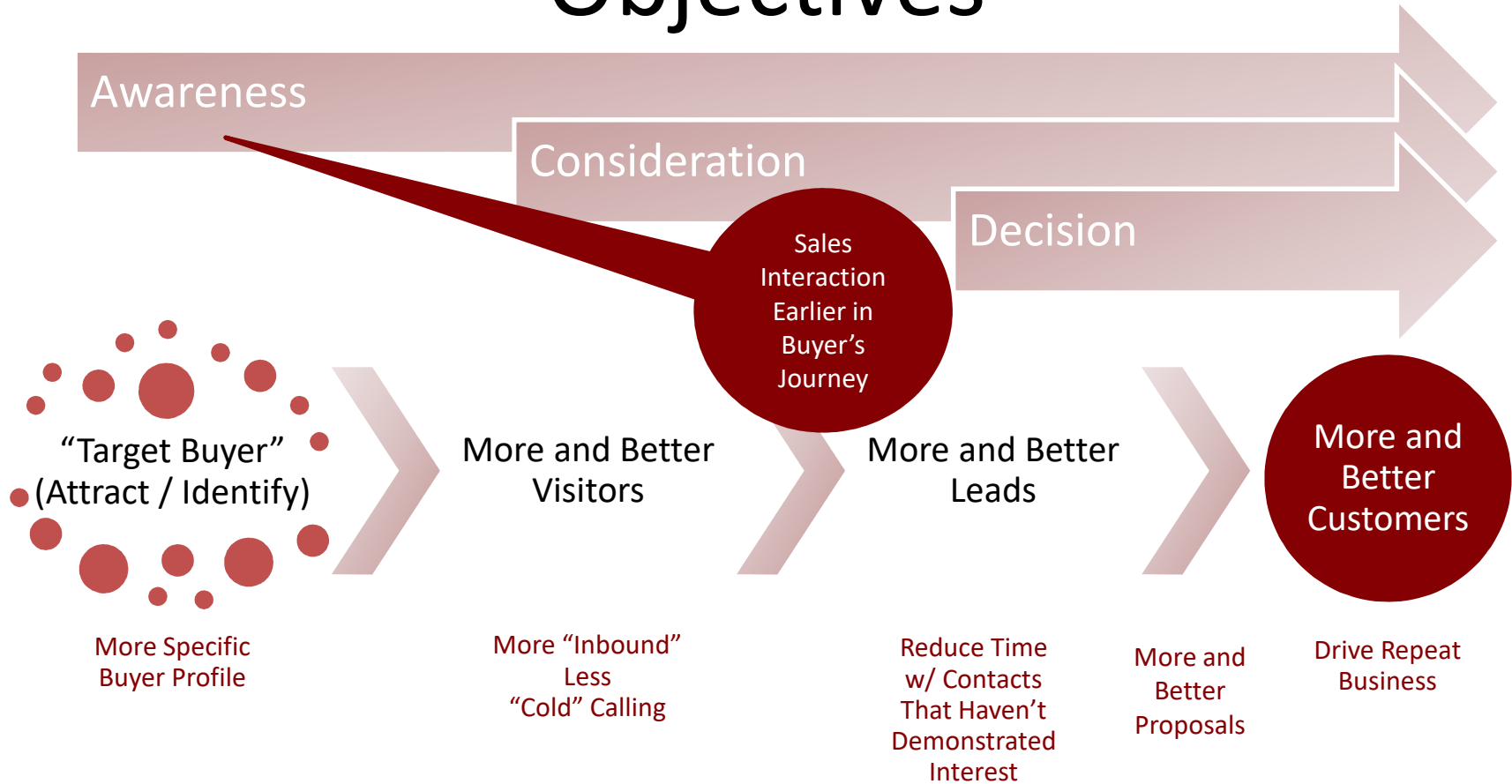
- Digital interactions brings interested lead to salesperson.
- MORE TIME with interested leads!

## Fit

- Sales person then determines fit (Money, Authority, Goal, Plan, Challenge, Timing, Consequences, Implications)
- Old way was to find a company, run down contact, raise interest and qualify as you go along.



# Objectives



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Odds of selling existing product to existing client – 1:2  
Odds of selling new product to existing client – 1:4  
Odds of selling existing product to a new lead – 1:8  
Odds of selling new product to a new lead – 1:24



# Planning

## Metrics

- Visits
- Leads
- Proposals
- Customers / Orders
- Repeat Customers / Orders
- Referrals

## Challenges

- People (Hours + Skills)
- Technology
- Money

## Timing

- Why now?
- Window?

## Implications / Consequences

- What happens if you hit your goals?
- What happens if you don't?



Content

+ Traffic/Conversion

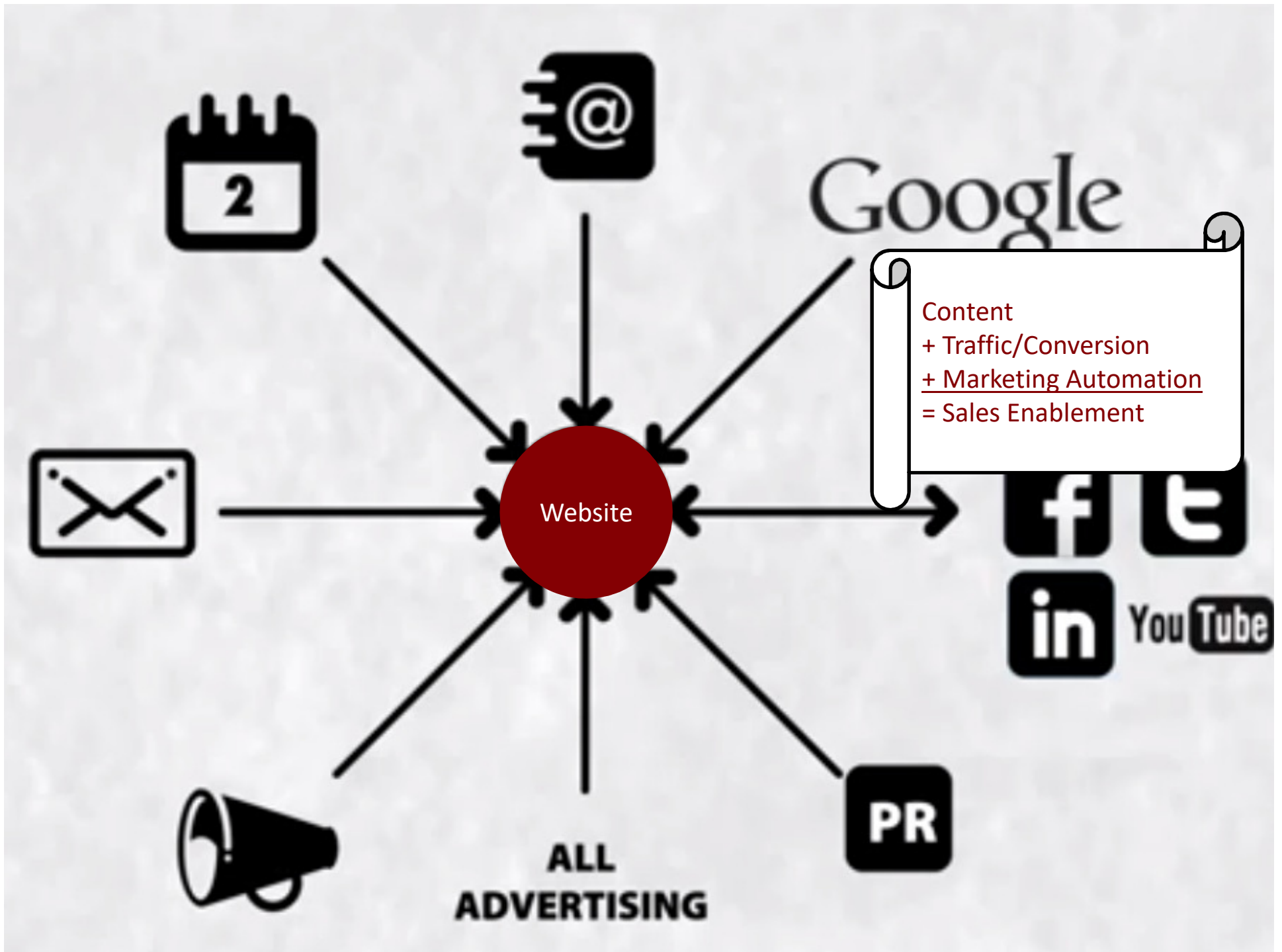
+ Marketing Automation

= Sales Enablement

# HOW TO BUILD A FULL FUNNEL LEAD GENERATION AND SALES SYSTEM



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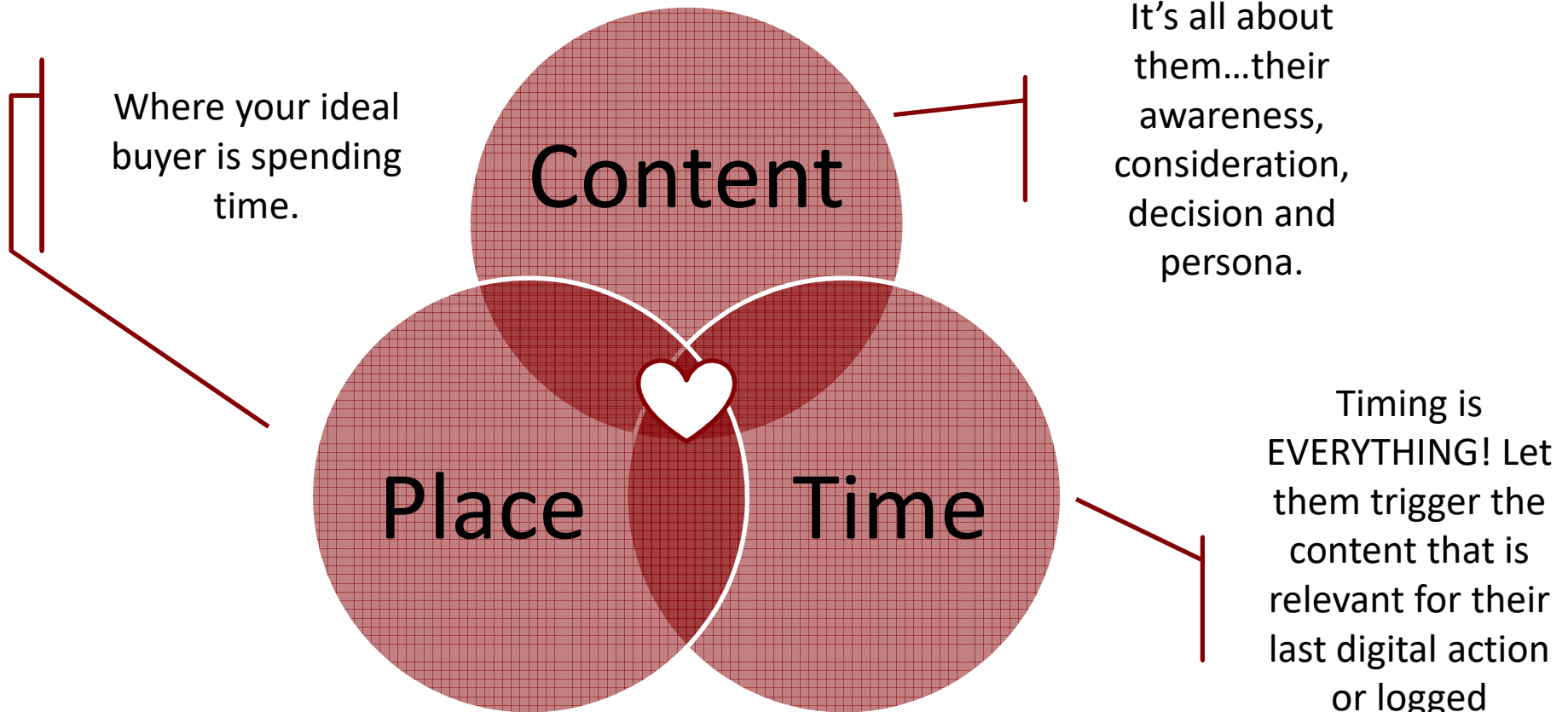


# More and More Content. You Might Ask..

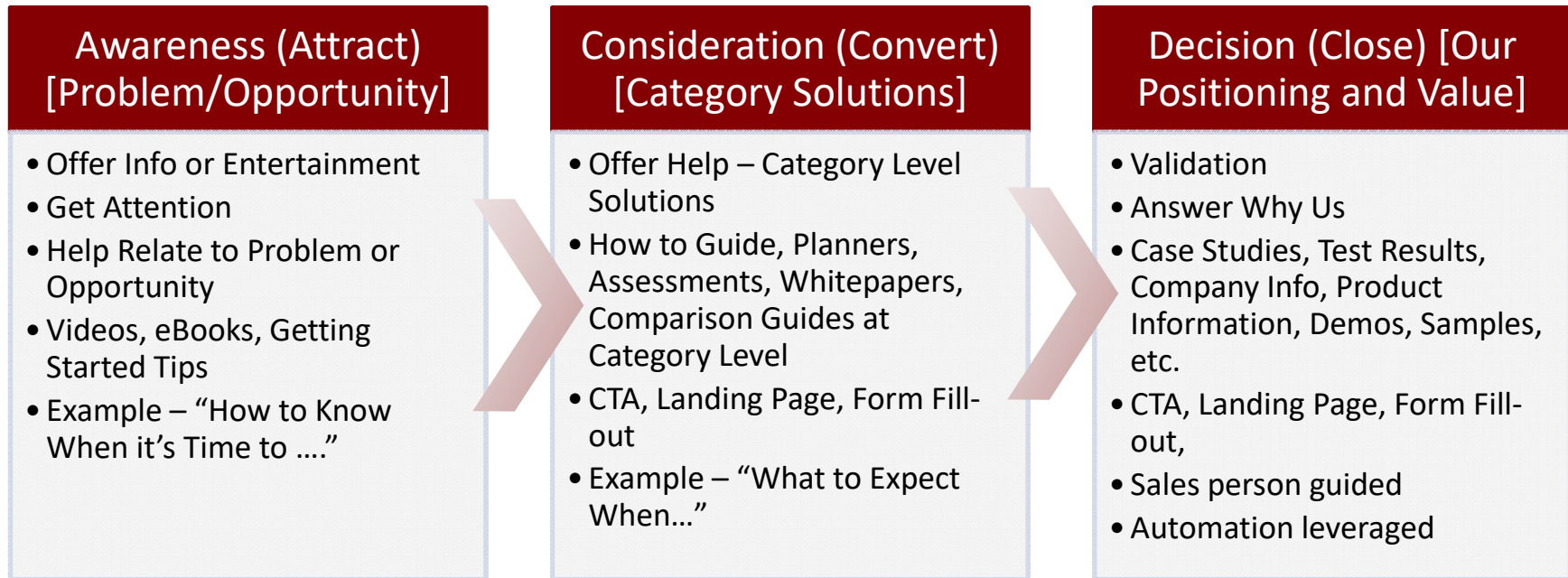
- What kind and how much content do we need?
- Who has time to create it?
- We have product and company information – can't we make that work?
- How can we know if the investment will pay off?
- What technology do we need?
- What training and support do we need?



# 1<sup>st</sup> ...Marketing People Love



# What Kind of Content?



Designed for persona, target keywords and then published on your website, social media, guest blogs, and promoted via ad words, Linked In Ads, and digital retargeting and CRM tracking ads.



# Digital Ad Example...

The screenshot shows a web browser displaying an Architizer blog post. The browser's address bar shows the URL [architizer.com/blog/solutions-for-daylighting-design/](http://architizer.com/blog/solutions-for-daylighting-design/). The page features a navigation menu with categories like News, Projects, Products, Brands, Source, and A+Awards. A yellow banner at the top of the page reads "Final Entry Deadline: December 16 - Enter the A+Awards Now!". The article title is "The Brightest Solutions for Daylighting Design" by Michigan Taubman College of Architecture and Urban Planning, dated 2012, Guardian Industries Corp. Below the article is a "Related articles" section with six thumbnails and titles. A purple advertisement for Libart is positioned below the related articles, featuring the text "WE HAVE YOU COVERED" and "With a Retractable Enclosure from LIBART Libartusa.com". At the bottom of the page, there is a comment section with "0 Comments" and a "Start the discussion..." input field.

architizer.com/blog/solutions-for-daylighting-design/

Apps Bookmarks Grabill Connect Login Grabill Cabinets - Mic Kitchen Marketing From Sales To CEO MarketingSherpa AIT Bioscience - Miles University of Notre D Press This Fresh Beginnings Gou Other bookmarks

Final Entry Deadline: December 16 - Enter the A+Awards Now

Architizer News Projects Products Brands Source A+Awards Search for architecture & products...

Chad Root

Architizer Editors > The Brightest Solutions for Daylighting Design Michigan Taubman College of Architecture and Urban Planning

Comment f t g+ p in

2012, Guardian Industries Corp.

Related articles

Fundamentals and Tools for Specifying for Glass Façades  
Earlier this month, a popular Washington, D.C.-based

From Past to Present: Today's Fire-Rated Glass Curtain Walls Are More Attractive Than Ever  
In just 30 years, Technical

Scaling Down Three-Dimensional Glass Block for Residential Projects  
Small can have big impact — when it comes to residential

Today's Glass Products Deliver Energy Efficiency and Good Design  
Performance and aesthetics don't necessarily need to be

Efficiency Expert: A Portland Campus Gets a Green Makeover  
After a 2008 voter-approved bond, the team at Opis

Glass Architecture Made Smart With State-Of-The-Art Shading Systems  
One of the ironies of modern "green" architecture and

WE HAVE YOU COVERED

With a Retractable Enclosure from LIBART Libartusa.com

0 Comments Architizer Chad Root

Recommend Share Sort by Best

Start the discussion...



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# CTA, Landing & Thank You Example

## The Conversion Process

Call-to-Action



Essential Guide to:

**Member Engagement**

Free Ebook

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Landing Page



Votility.

**Ebook: The Essential Guide to Member Engagement**

Learn how to better engage your members, increase participation, and empower them to take action!

Take associations, advisory groups, and members of commerce all have one thing in common. **They need to increase member engagement. But how?**

Coming up with creative ways to engage members and increase participation is challenging, so we have some ideas for you! Learn the best practices and creative ways to engage members with our new ebook, "The Essential Guide to Member Engagement". In this member engagement guide you will learn:

- How member engagement works
- The Top 5 reasons why members don't engage!
- How to utilize the member advocacy in-text features, engage, empower

Download the **FREE** ebook today!

Get Your Copy Now!

First Name \*

Last Name \*

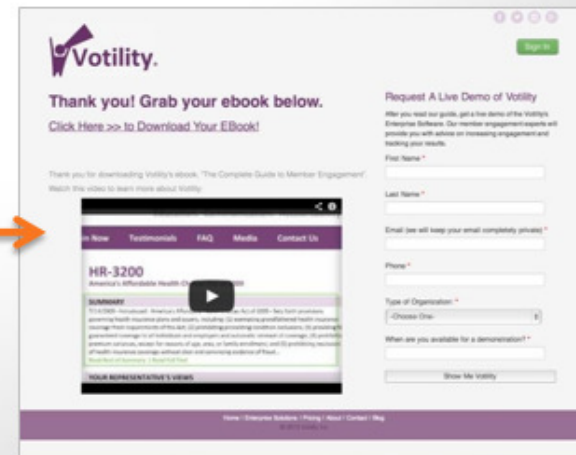
Email (we will keep your email completely private) \*

Type of Organization \*

Choose One

Download Now!

Thank You Page



Votility.

**Thank you! Grab your ebook below.**

[Click Here >> to Download Your Ebook!](#)

Thank you for downloading Votility's ebook, "The Complete Guide to Member Engagement". Watch this video to learn more about Votility.

Request A Live Demo of Votility

After you read our guide, get a free demo of the Votility Enterprise Software. Our member engagement experts will provide you with advice on increasing engagement and making your results.

First Name \*

Last Name \*

Email (we will keep your email completely private) \*

Phone \*

Type of Organization \*

Choose One

When are you available for a demonstration? \*

Show Me Votility



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# The Forgotten...

## Delight (Expand) [Repeat and Referral]

- Surveys
- Automated Upsell / Cross-Sell (Aware, Consider, Decide) CTA's
- Social Monitoring with Automated Triggers
- Automated Appreciation



# How Much Content, Time & Talent?

## Content

*Companies that have 30 or more landing pages convert 7 times more leads than companies that have less than 10 landing pages.” - Hubspot*

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- 48-60 Posts + 30 Landing pages

## Time

*It takes time to be relevant and professional.*

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- 1-2 Full Time People for a Year

## Talent

*It takes a village – Management, Multi-Media Content, Multi-Channel Placement, Technology*

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- Requires 3-4 Specialties



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# How to Create It?

- Curate – are you already reading Plastics News, Packaging Technology, Mold Making Magazine, etc.? Share your thoughts and a link to the article. Can also repurpose your principals content.
- Create – Layout a content map on a calendar. Have a content director interview you and your experts and create it for you.
- Field video, photography can easily be used or supplemented with voice over, sound and graphics.



# Your Company and Product Information

- This is for people that are in the Decision stage. It can be great for repeat customers. It's not very useful for generating new leads that are early in Awareness or Consideration.
- Simply put, this belongs on your website in overview format with downloads for details.
  - Sales people are notified
  - In other words, unless it's an eCommerce site, we just want to entice online and get to the contact to a salesperson.



# How Much Traffic Do You Need?

			Awareness	Consideration	Decision	
	Digital Ad / Social Impressions	Direct CTA Impressions	Landing Page Visits (from CTA's)	Leads	Proposals	Customers / Orders
Repeat Customers, Existing Product	n/a	Onsite/Email 10% click, 100-200 visits/sends	10-20	4-8 (40%)	2	1
Repeat Customers, New Product	n/a	Onsite/Email 10% click, 200-400 visits/sends	20-40	6-12 (30%)	4	1
New Leads, Existing Product	.1% click 6-12K imp	Onsite/Email 2.5% click, 2,400-4,800 visits/sends	60-120	12-24 (20%)	8	1
New Leads, New Product	.1% click 24-36K imp	Onsite/Email 2.5% click, 9,600-19,200 visits/sends	240-360	24-36 (10%)	24	1

1) How many of each do you need to achieve your goals? How many existing contacts do you have?

2) Set traffic goals and determine volume goals for direct, organic, social and paid.

3) 1-2% click through rate goal for a CTA for contextual placement (logical web flow), .1% for roaming ads

# When to Buy Digital Ads

## Before Buying Traffic...

1. Create great content.
2. Share with existing customers.
3. Share with existing leads.
4. Retarget web visitors and your contact lists.

## Paid Traffic

- Retargeting
- Roaming Display
- LinkedIn
- YouTube
- PPC
- Media Partners



# Ensuring ROI

- It's a process with measurable steps so it can be piloted, scaled and repeated.
  - Digital ads, web links, visitors, forms, email opens, email clicks and sales interactions are all trackable.
- The [Inbound Methodology](#) is proven.
- Starter digital campaigns are pay for performance and are easily tracked for ROI.
- Marketing automation ensures lead follow-up and automatically gets the salesperson involved based on the leads activity.



# What is Marketing Automation?

- At each step of the funnel, marketing automation tracks webpage visits, form fill-outs, email opens, email clicks, responses, sales person interaction and purchasing.
- Based on a contacts tracked footprint, they are delivered tailored content that is relevant for their interest, timing and place.





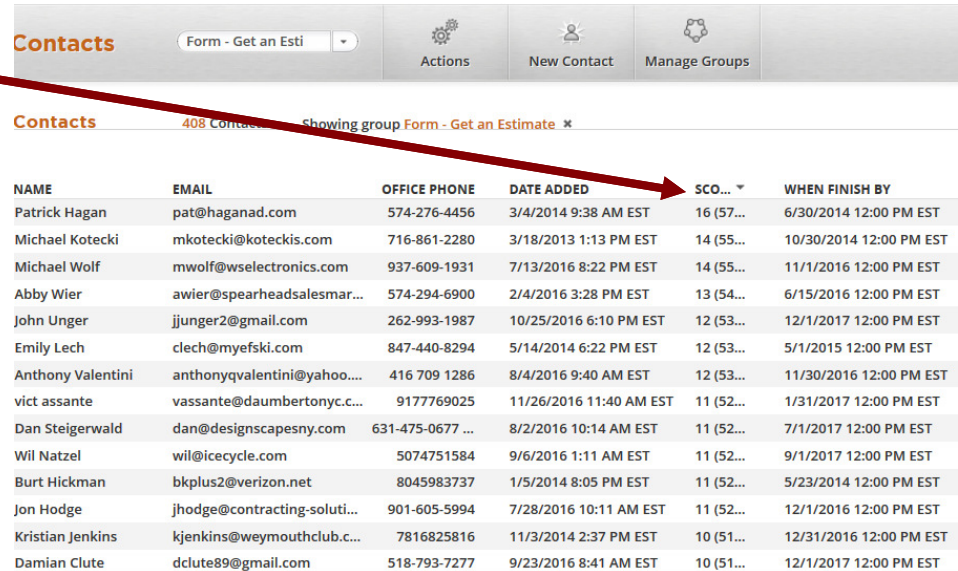
# Results with Marketing Automation...

- Conversion rates as high as **50%** -eMarketer
- **15-20%** decrease in marketing spending -McKinsey
- **12.2%** reduction in marketing overhead -Nucleus Research
- Existing customers **50%** more likely to try new products -Invesp
- Existing customer spend **30%** more -Invesp
- **9X** more likely to achieve customer loyalty -DataMatics



# Marketing Automation Example

- Lead Scoring
  - Contact Visits 3 Web Pages (+1 Point)
  - Contact Clicks CTA button (+1 Point)
  - Contact Completes Form (+3 Points)
  - Erode 1% per day
  - Assign active contacts to “Friday at 5:00 Report”



The screenshot shows a CRM interface with a 'Contacts' list. A red arrow points from the 'Lead Scoring' list on the left to the 'SCO...' column in the table, indicating that the scores are being applied to the contacts.

NAME	EMAIL	OFFICE PHONE	DATE ADDED	SCO...	WHEN FINISH BY
Patrick Hagan	pat@haganad.com	574-276-4456	3/4/2014 9:38 AM EST	16 (57...	6/30/2014 12:00 PM EST
Michael Kotecki	mkotecki@koteckis.com	716-861-2280	3/18/2013 1:13 PM EST	14 (55...	10/30/2014 12:00 PM EST
Michael Wolf	mwolf@wselectronics.com	937-609-1931	7/13/2016 8:22 PM EST	14 (55...	11/1/2016 12:00 PM EST
Abby Wier	awier@spearheadsalesmar...	574-294-6900	2/4/2016 3:28 PM EST	13 (54...	6/15/2016 12:00 PM EST
John Unger	jjunger2@gmail.com	262-993-1987	10/25/2016 6:10 PM EST	12 (53...	12/1/2017 12:00 PM EST
Emily Lech	clech@myefski.com	847-440-8294	5/14/2014 6:22 PM EST	12 (53...	5/1/2015 12:00 PM EST
Anthony Valentini	anthonyvalentini@yahoo....	416 709 1286	8/4/2016 9:40 AM EST	12 (53...	11/30/2016 12:00 PM EST
vict assante	vassante@daumbertonyc.c...	9177769025	11/26/2016 11:40 AM EST	11 (52...	1/31/2017 12:00 PM EST
Dan Steigerwald	dan@designscapesny.com	631-475-0677 ...	8/2/2016 10:14 AM EST	11 (52...	7/1/2017 12:00 PM EST
Wil Natzel	wil@icecycle.com	5074751584	9/6/2016 1:11 AM EST	11 (52...	9/1/2017 12:00 PM EST
Burt Hickman	bkplus2@verizon.net	8045983737	1/5/2014 8:05 PM EST	11 (52...	5/23/2014 12:00 PM EST
Jon Hodge	jhodge@contracting-soluti...	901-605-5994	7/28/2016 10:11 AM EST	11 (52...	12/1/2016 12:00 PM EST
Kristian Jenkins	kjenkins@weymouthclub.c...	7816825816	11/3/2014 2:37 PM EST	10 (51...	12/31/2016 12:00 PM EST
Damian Clute	dclute89@gmail.com	518-793-7277	9/23/2016 8:41 AM EST	10 (51...	12/1/2017 12:00 PM EST




# Sales Uses Digital Footprint

**George Petzen (gpetzen@linel.co)** CONTACT INFORMATION CONTACT HISTORY LIBART INFORMATION STOETT INFORMATION

11/23/2016 5:03 PM EST	Fullfillment	Sent	Jeff Bajit (Solution Source)
11/22/2016 5:02 PM EST	Fullfillment	Sent	Jeff Bajit (Solution Source)
11/21/2016 5:01 PM EST	Fullfillment	Sent	Jeff Bajit (Solution Source)
11/21/2016 2:42 PM EST	Visit	Sent ✓	Visits tracked for 2016-11-21
11/21/2016 2:32 PM EST	Email	Sent ✓	Rooftop Restaurant Features Libart Clearsky Skylights

**MAIL DETAILS**



**The Kimpton Gray Hotel Captivates with its**

**ACTIVITY**

TIME	DETAILS
11/21/2016 2:53 PM EST	Email Opened
11/21/2016 2:53 PM EST	Email Clicked (3: www.li

11/20/2016 5:00 PM EST Fullfillment Sent Jeff Bajit (Solution Source)

TIME	DETAILS
11/21/2016 2:47 PM EST	www.libartusa.com/architectural-hub/clearsky-retractable-skylights/::ClearSky Retractable Skylights - Liba
11/21/2016 2:46 PM EST	www.libartusa.com/pool-builder-partner-program/::Pool Builder Partner Program - Libart USA
11/21/2016 2:46 PM EST	www.libartusa.com/pool-builder-partner-program/::Pool Builder Partner Program - Libart USA
11/21/2016 2:42 PM EST	www.libartusa.com/architectural-hub/panora-view-retractable-windows/::Panora-View Retractable Windo
11/21/2016 2:42 PM EST	www.libartusa.com/restaurant-retractable-skylight-roof-highlights-arrival-kimpton-gray-hotel/::Restauran

clearsky Skylights 012016-Liba-Commercial Featured Projects for Contacts

# Automation Forms & Follow-ups

The screenshot shows a web form with a blue navigation bar containing links for APPLICATIONS, GALLERY, ARCHITECTURAL HUB, PRICING, ABOUT, and MOTION MATTERS. The form includes several input fields and dropdown menus: a 'Select...' dropdown, 'Best Day and Time for Phone Consultation' (text input), 'Application Interest' (dropdown), 'Role In Project' (dropdown), 'Company' (text input), 'When do you want to have your project finished by?' (text input with 'mm/dd/yyyy' placeholder), and 'What stage would you consider your project to be in?' (dropdown). Below these are 'Coverage Length' and 'Coverage Width' (text inputs), a 'Project #' field, and a 'Project Notes' text area. A 'Submit' button is at the bottom right, accompanied by a privacy notice: 'We Value Your Privacy'. A small image of a gallery interior is also visible.

## Smart Form

- Tag – “Get an Estimate” & “Libart”
- Assign to Follow-Up
- Change Status to “L2”
- If “Commercial” Assign to “C”; If Residential Assign to “R”
- Notify Salesperson
- Thank You Page



## Database Integration

- Ping URL to Send data to CRM
- Salesperson checks – “Pricing Completed”
- Salesperson checks next step “Viability Assessment”
- Salesperson checks next step “Contract”



## Sequence

- 1 Day – Send letter, picture of project, and hand written sticky note
- 15 Days - Do they have a planner? No – Send offer email, Yes – Send offer to help fill it out. 30 Days – If no activity, reminder of next steps
- 45 Days – if no activity, “Is Your Project Going Forward?”
- Salesperson notified with task if anyone downloads, outcome can remove from sequence



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# Technology Components

## CRM

Salesforce, Sugar and dozens of others.  
Not much use on their own and pricey.  
Hubspot is free and the best going.

## Marketing Automation

Hubspot is fully integrated w/ CRM and costs \$800/mo + options for a full system; starter version at \$200/mo

ONTRAPORT is an all in one tool but is more like an erector set; can build anything but it's ground up; \$297/mo

Marketo is an enterprise level best in class package but more money and more bulky than needed here; \$1,500/m

## Website

WordPress or Custom? – most flexible but a lot of integration work

Hubspot offers integrated system – easiest, most affordable

**Objective of a website is to support your system: content + traffic/conversion + marketing automation = sales enablement.**

**Leverage integrations for tracking and to further enable salespeople**

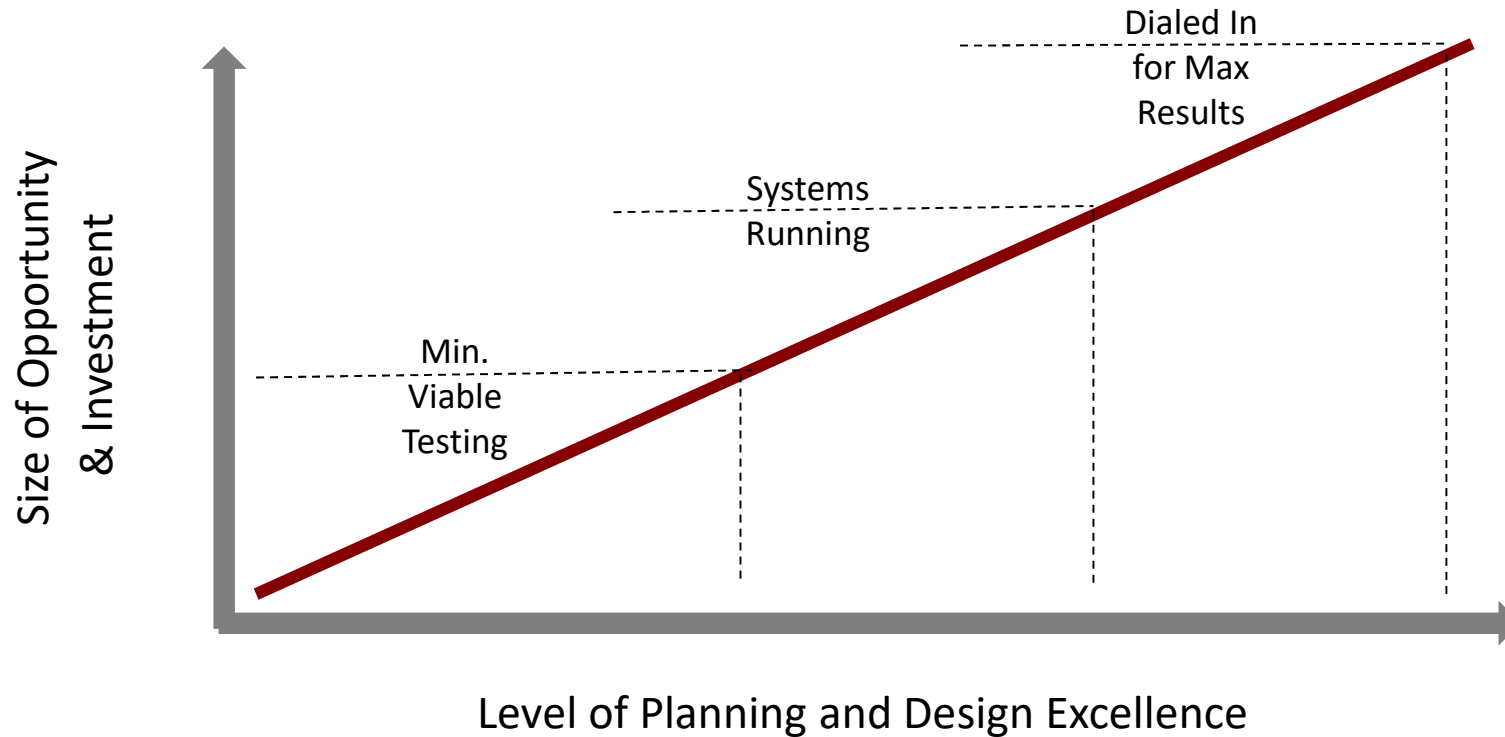


# Training and Support from Spearhead

- Your strategy, goals, planning and action steps.
  - We provide an initial 12-mo plan, quarterly goal setting, 30 day follow-up
  - Includes forecast, budget, calendar
- Content delivered through Web, CRM and Marketing Automation
  - Awareness, Consideration, Decision Content
    - Multimedia Copywriting, Video, Photo, Graphics
  - Social Media, Press, Guest Blogs
  - Digital ads
  - Offline integration
- We'll train you to jump into the process at the appropriate places and provide you with dashboard reporting
- Full web platform development, maintenance and updating
- We commit to budgets before proceeding and recommend a monthly retainer format for optimum effectiveness and efficiency.



# Investment vs. Opportunity



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We need this to create a plan.

# Planning

## Metrics

- Visits
- Leads
- Proposals
- Customers / Orders
- Repeat Customers / Orders
- Referrals

## Challenges

- People (Hours + Skills)
- Technology
- Money

## Timing

- Why now?
- Window?

## Implications / Consequences

- What happens if you hit your goals?
- What happens if you don't?





# Take-Aways...

1. The digital landscape requires a lot of relevant content, in the right place, at the right time in order to engage buyers in problem/opportunity awareness and solution consideration.
2. Traffic and conversion metrics for both existing contacts and strangers must be in place to ensure full funnel effectiveness and ultimately efficiency.
3. Marketing automation enables superior lead/client follow-up, timely salesperson involvement and continuous improvement of your system.





**Chad Root** President and Founder

Chad is responsible for strategic oversight of client initiatives. His strength is sizing up opportunities and designing a game plan to achieve results. Prior to founding Spearhead in 2006, Chad was responsible for business management, sales and marketing at three mid-size manufacturing companies: Fast Heat, Freeman Company and Fremont Die Cut Products. In all three cases, he more than doubled sales while increasing gross margin. He accomplished this by closing the largest clients within each industry including Letica Corp, Denso Mfg, Pactiv, Genpak, General Motors, Frigidaire to name a few. Chad earned an MBA from Case Western Reserve's Weatherhead School of Management and a B.S. in Architecture from The Ohio State University. He is currently serving as Treasurer and Continuing Education Director for the Northern Indiana Chapter of the American Institute of Architects.



**Rick Horn** Vice President of Management Services

Rick provides strategic consulting along with sales and behavioral change coaching. He works with assigned clients to oversee their strategy development and provide sales, marketing and coaching support for their growth initiatives. Complementing his activities with Spearhead, Rick is also the owner of Play Tall Consulting. A company that provides business and sales coaching to assist business leaders to accelerate their personal and company growth. Over three decades he held VP to CEO positions with five different manufacturing companies within the Truck Equipment and RV Industries. Including leading the Sales and Marketing of Supreme Industries in Goshen to a growth of 40 times in revenues. Rick earned a Bachelor's Degree in Business from Hillsdale College and has earned recognition through the years as an aggressive "Street Smart" growth executive.





**Ben Dorsey** Director of Engagement

Ben brings to Spearhead nearly three decades of strategic marketing experience. Such experience has included VP of Marketing roles for B2B manufacturers where he was responsible for such factors as communications (corporate, marketing, technical), branding, advertising, events, product line management, training, and sales support. He uses this experience to help our clients achieve enchanting engagements with their customers and potential customers. Ben has won numerous national and international awards for writing, design, and public speaking and has been a frequent conference presenter. He received a bachelor's degree in Scientific and Technical Communications from Bowling Green State University (Ohio).



**Abby Wier** Graphic Designer

Prior to working at Spearhead Abby was employed as the Marketing/Graphic Design Specialist at the Greater Elkhart Chamber. Before that she worked at The Elkhart Truth in their graphic and marketing department. She also worked as a graphic designer for a magazine and a book publishing/software company. Her duties included designing entire campaigns for various events, logos, billboards, flyers, brochures, banners, postcards, web banners, and more. Abby brings over 19 years of experience in graphic design to Spearhead, including 11 years working in a Marketing Department and 5 years as a part time freelance designer for several local businesses and not-for-profit organizations. She is a graduate of Kendall College of Art and Design with a Bachelor of Fine Arts in Visual Communication.



**Content**

**+ Traffic/Conversion**

**+ Marketing Automation**

**= Sales Enablement**



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