



GETTING IT
STARTED,
BRINGING IT
HOME

**2018
MARKETING & SALES
CONFERENCE**

DEC. 11-12 | WESTIN O'HARE | ROSEMONT, IL



Sales Hides Sins


The Wrong CRM Will Kill Sales -- How to Leverage Modern CRM and Marketing Automation

Chad Root, December 11, 2018



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Architecture + MBA

“Whale Hunter”

Founded Spearhead
2006

Integrated Sales and
Marketing Systems
Expert



Today's Objective

Help you identify the right CRM and Marketing Automation tool/s for your organization.

- The Good
- The Bad
- The Ugly

Salesforce – Hubspot - ONTRAPORT

70% of CRM
implementations fail 😞

“Vision without action is a **daydream**.
Action without **vision** is a **nightmare**.”

growth/grōTH/

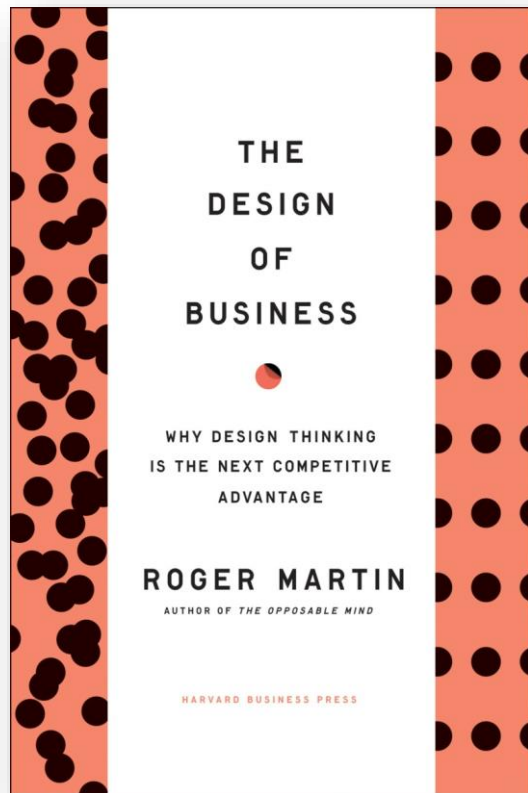
Noun: 1. The process of increasing in physical size.
2. The process of developing or maturing physically, mentally, or spiritually.

proc-ess, pro-cess/'prä,ses/, /prə'ses/

Noun: A series of actions or steps taken to achieve an end.

Synonyms:

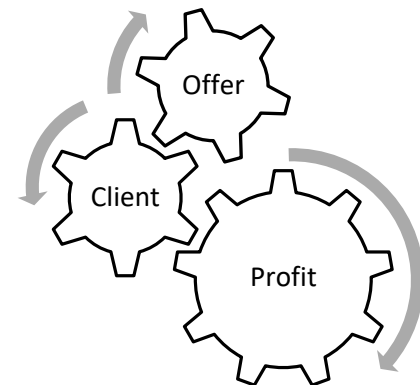
noun. procedure - method - trial - course - way – progress



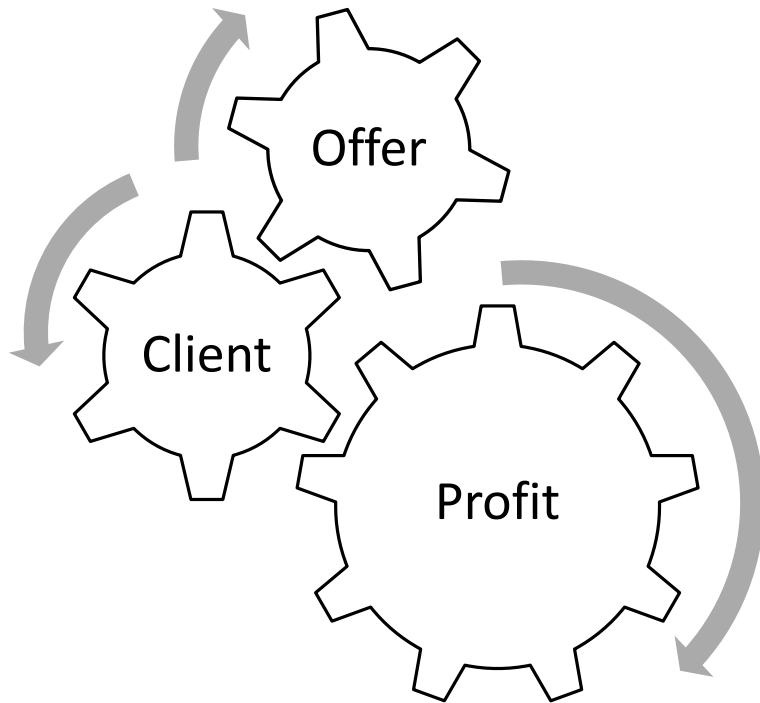
Mystery



Model,
aka "Art"



Formula,
aka
Machine



Develop a process that enables you to choreograph the buyer journey so that you establish credibility and build confidence.



The Buyer's Journey

Demystified
by Forrester

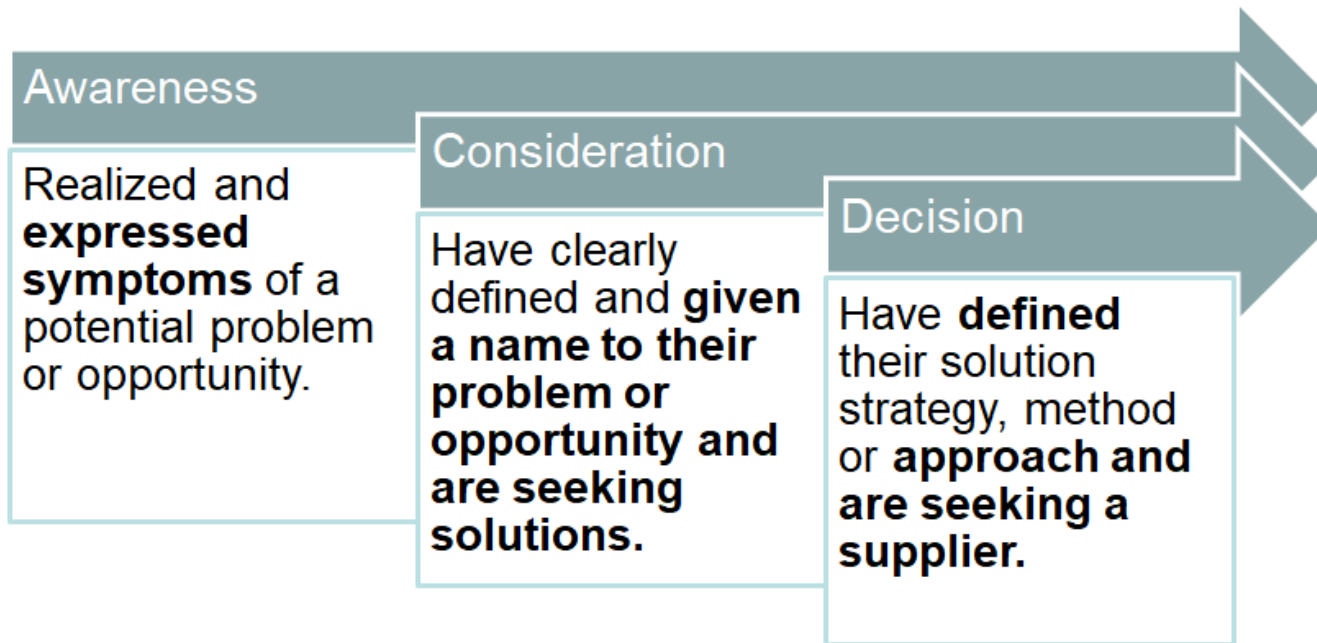
-
- 57% before talking to supplier ([CEB/Gartner](#))
 - Bottom Line - We **MUST** see and choreograph the ENTIRE journey!
 - You can't manage, what you can't see.

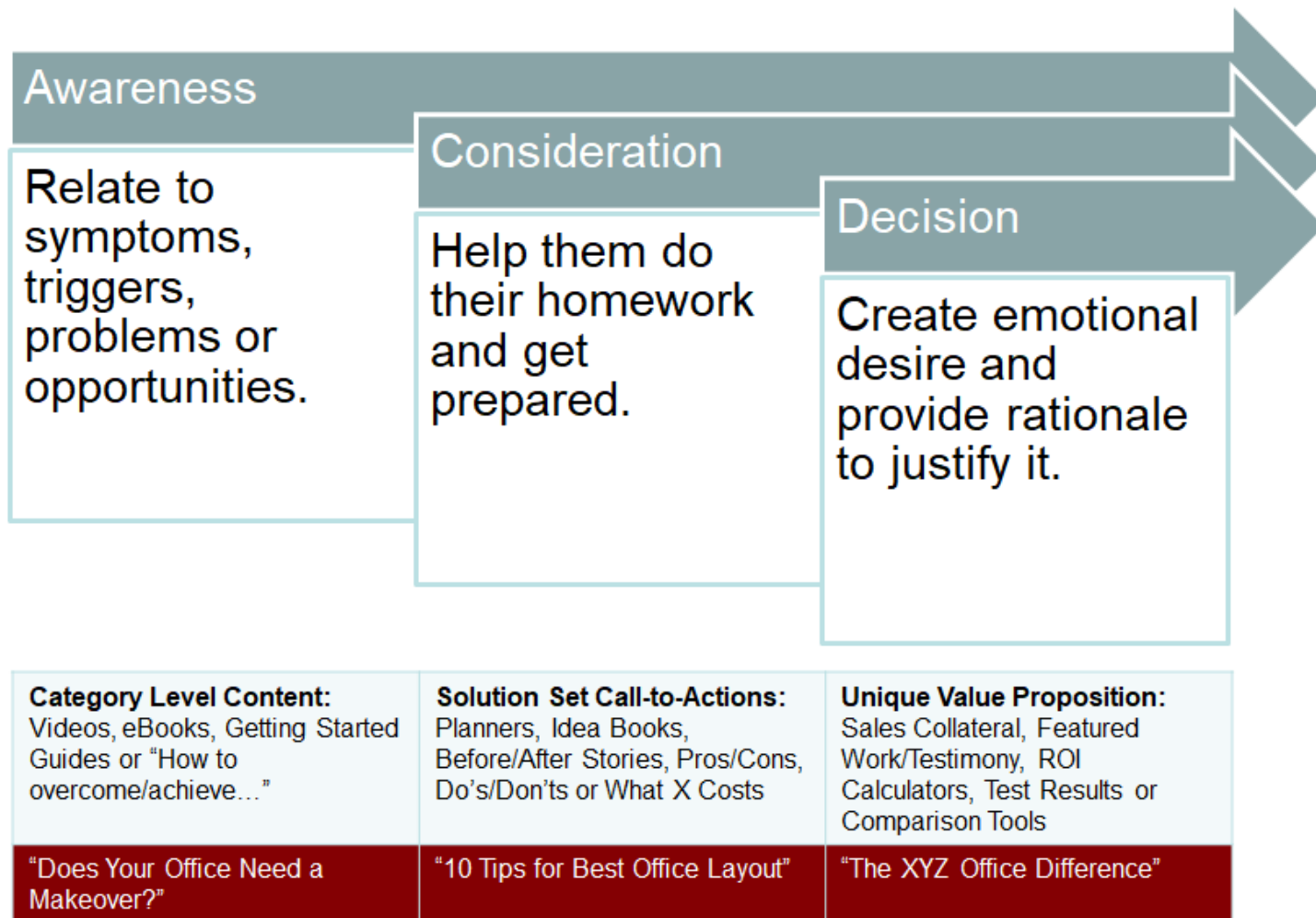
Semantics

Buyer Centric	Gartner	ONTRAPORT	Spearhead's Job
Awareness	Explore	Attract	Identify
			Connect
Consideration	Evaluate	Convert	Nurture
Decision			Convert
Experience	Engage	Fulfill	Expand
		Delight	
		Refer	



Buyer Journey

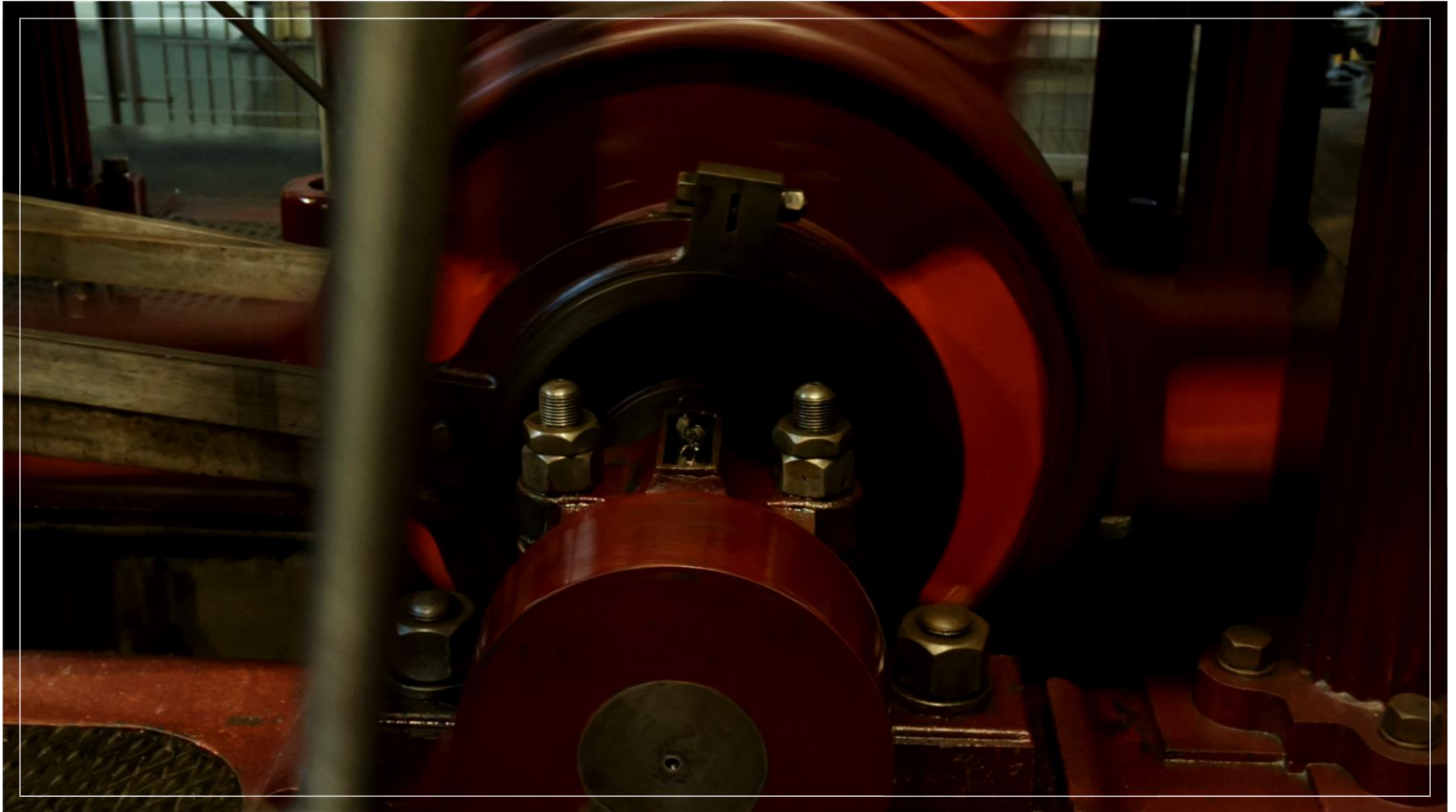




Flipping the “Funnel” & Setting Goals

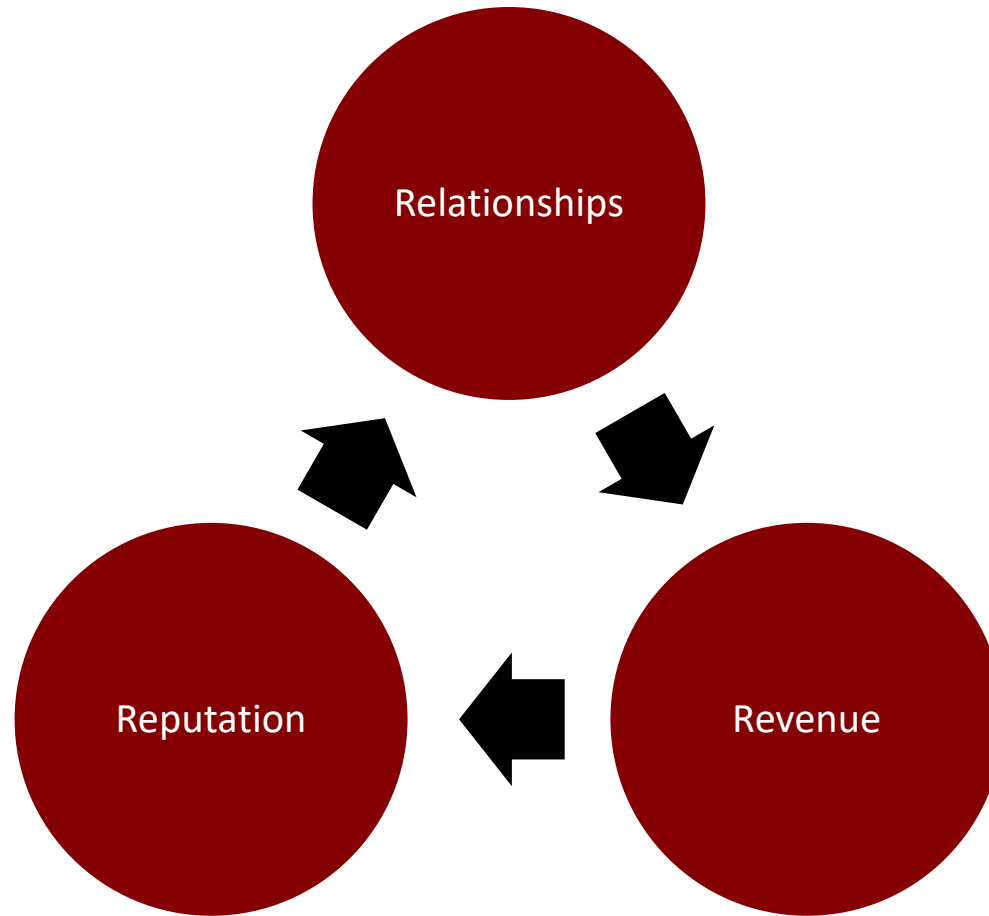
Effort Here	Produces Contacts Here	How Many Do You Want? (May do by segment)	Conversion Rate
Expand	Advocates	33	1/3
Convert	Clients	100	1/2
Nurture	Prospects	200	1/2
Connect	Leads	600	1/3
Identify	Suspects	1,800	





Related article: jimcollins.com/article_topics/articles/flywheel.html#articletop

The Ultimate Flywheel



3 Ingredients for Growth



Clear
Objectives



Systems



Committed
Resources

Commit the Time, Talent and Money

Stage	Ingredient	Desired Result	Time (Work)	Talent (Skills)	Money (Cash + Capital)
Mystery	Intuition	Innovation			
Model	Experience	Learn & Refine			
Formula	Systems	\$\$\$\$\$\$ Exploit			

New vs. Existing Relationships

Odd's of Buying...

Product Stage	Customer Stage	Odds of Buying
Established	Existing	1 in 2
New	Existing	1 in 4
Established	New	1 in 8
New	New	1 in 24

Lesson's to Seller's...

Priority #1 - Secure existing customers with established and new products/services

Priority #2 - Re-visit accounts that got away

Priority #3 - Hunt new accounts

Source: Selling In A Down Economy by Robert B. Miller, Founder, Miller Heiman

The Cost of Doing Nothing

Do sales go down with existing clients?

Does your brand reputation take a hit?

Do you give up longer term benefits like increased brand equity?

- Helps with company market value
- Helps with employee recruiting
- Helps with referral generation



Search for people, jobs, companies, and more...



Advanced



1



7



6d ago



Amy Phelan Wishing you the best in your new job!

6d ago

Chad Root's Update



SALES STATISTICS

48% OF SALES PEOPLE NEVER FOLLOW UP WITH A PROSPECT
25% OF SALES PEOPLE MAKE A SECOND CONTACT AND STOP
12% OF SALES PEOPLE ONLY MAKE THREE CONTACTS AND STOP
ONLY 10% OF SALES PEOPLE MAKE MORE THAN THREE CONTACTS
2% OF SALES ARE MADE ON THE FIRST CONTACT
3% OF SALES ARE MADE ON THE SECOND CONTACT
5% OF SALES ARE MADE ON THE THIRD CONTACT
10% OF SALES ARE MADE ON THE FORTH CONTACT
80% OF SALES ARE MADE ON THE FIFTH TO TWELFTH CONTACT

Source: National Sales Executive Association



Chad Root

Good to see the additional reference points for sales effectiveness

Like (10) • Comment (3) • Share



Nicholas Milovich, Pete Owsianowski and 8 others



Steve Miller Food for thought
18d ago



Lane Gerber Now that is some good information.
13d ago



Chad Root Good to hear from you Lane.
13d ago

Comment



The Dreaded Pipeline Review Sales Meeting

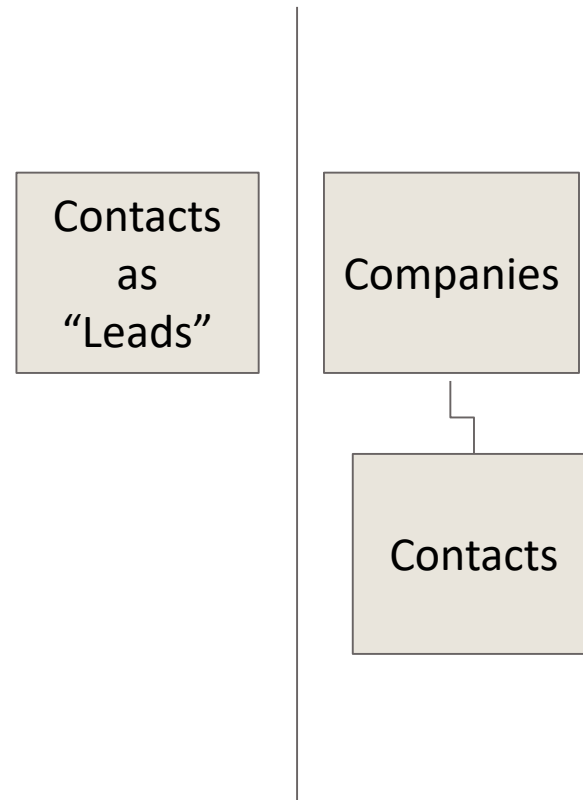
It's Monday or Friday, early in the morning or late in the day. An entire sales team on a conference call "reviewing the pipeline."

- Wasting time on "tire kicker" proposals
- Not sure how they got on here
- Won't call me back

Salesforce, NetSuite, etc - Eat Your Heart Out!

Most enterprise CRM's silo the lead data separate from Company:Contact data.

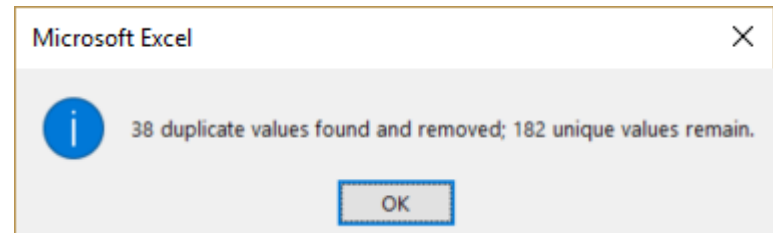
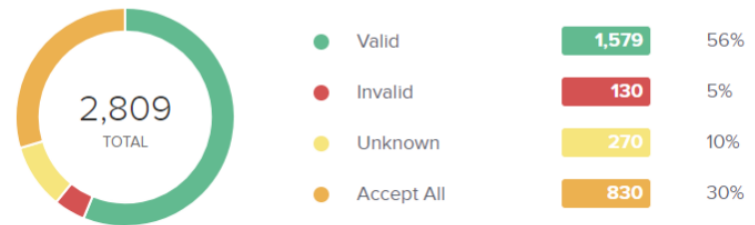
- Duplicate records with discrepancies
- If converted, when?
- Marketing vs. Sales
"Departments"



API or Export/Import - Mission Impossible

- Matching records via API is brutal!
- Passing bad data via export/import is efficient and unreliable.
- **Can't see the entire journey!**

Total Emails





Planning, implementation and
maintenance team....



<https://www.salesforce.com/solutions/essentials-enter-email/?d=7010M000002McrfQAC>
<https://www.salesforce.com/editions-pricing/sales-cloud/?d=cta-body-promo-12>



PUT YOUR SMALL BUSINESS IN THE FAST LANE TO GROWTH WITH SALESFORCE ESSENTIALS.

Chatter

Contacts

Accounts

Leads

Dashboards

Tasks

Sales Pipeline

Open Leads

OWNER	RECORD
Brett Philips	17
Nancy Morgan	10

Opportunity Pipeline This Quarter

276,612

Total Pipeline

STAGE	SUM
Negotiation	\$25K
Proposal	\$18K

Leads Created

Advertisement

External Referral

Trade Show

Employee Referral

Social

Web

Monthly Trend

Advertisement

External Referral

Trade Show

Employee Referral

Social

Web

Internet Provided by AT&T

Privacy

Wi-Fi Ads by Boingo

Advertise Here



Hubspot + Salesforce + Epicor

Salesforce Pros –

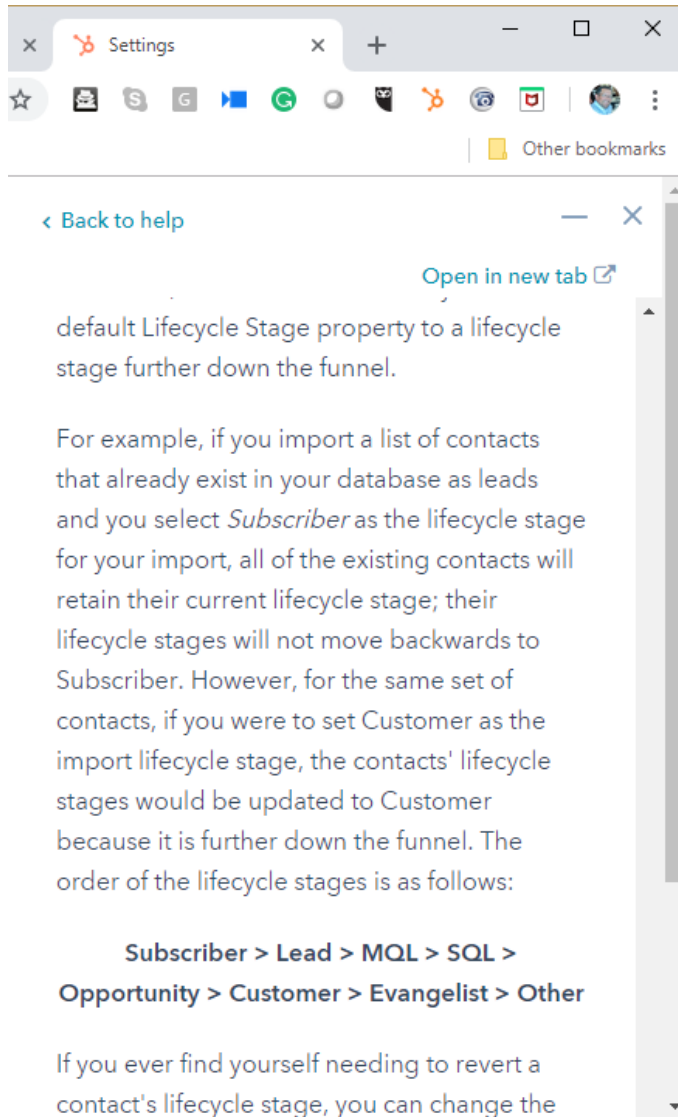
- Most powerful CRM with 3,000 + add ons like Map Anything and UPS tracking
- ERP integration with full visibility of quoting, orders and service
 - On-time record
 - Service calls
 - AR

Salesforce Cons –

- \$\$\$ and requires 3rd party implementation team
- Most small businesses will only use 30% of the capability
- Requires extra marketing tools like Hubspot, Pardot or others for entire buyer journey

HubSpot





“Locked Down” Hubspot

Protects the user from doing something that would break the system. For instance, Lifecycle Stage can only be updated going forward.

Auto sizing photos and videos

Real-Time SEO checklists

Auto save!

Expire a page on a certain date

Built in “password to view this page”

Easily add header and footer code snippets

Killer Vidyard integration for free (optimize videos and track view performance)

Auto “don’t send” to disengaged

Auto UTM Variables when Campaigns are setup

Auto background info on contacts (LinkedIn profile) and companies (data.com)

Killer service and educational tools

Auto redirect when renaming a url

Hubspot - Protecting Thy Self

Edit URL



Update will change the URL of your live page and add a redirect from the old URL. The redirect can be overridden later by publishing a new page to the old URL.

Update

Cancel



Show all



[Back to email dashboard](#)

Edit Settings Recipients Review Send or schedule

✓ Saved Save Save Next

Email details

From name * ⓘ
Kile Snyder Add/Manage

From address * ⓘ
kile.snyder@tfs-corp.com Add/Manage

Subject line * ⓘ
[[contact.firstname]] - Please join us at Fabtech ☺ ⌨ Personalize

Preview text ⓘ
Stop at BOOTH # C10822, Fabtech, Nov 6-8 in Atlanta ⌨ Personalize

● Looks a bit short. Try to write a little bit more.

Done

HTML Plain text

A/B

Review before you send

Done

✓ From

Kile Snyder (kile.snyder@tfs-corp.com)

Edit

✓ Subject

{{contact.firstname}} - Please join us at Fabtech

Edit

✓ Preview text

Stop at BOOTH # C10822, Fabtech, Nov 6-8 in Atlanta - Auto Series CNC Tube Bender, SOCO CNC Tube Bender, Romer CMM Arm

Edit

✓ Internal email name

181103-Fabtech 2018

Edit

✓ Recipients selected

3,197 people will receive your email

Edit

Send to

✓ All SQL (1,217)

✓ GDPR Suppression List (256)

✓ 181018-Lifecycle=Other (1)

Don't send to

Don't send to contacts with low engagement ⓘ

✗ Disengaged Contacts - no email opens in one year, no s...

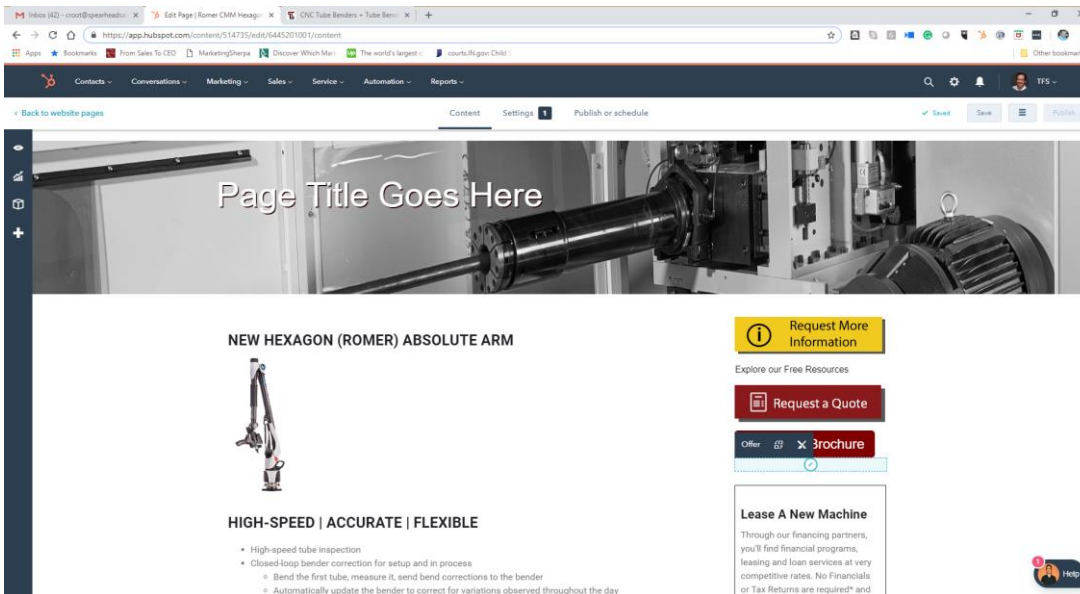
Proposal sent and no activity in past 14 days (0)

Not Fun

Creating a new template when you want to adjust a page design

Creating a new CTA instead of adding on the fly

Page editing is A LOT to get used to - alignment!



ONTRAPORT

Santa Barbara, CA



ONTRAPORT = FREEDOM + Locked Down Systems



Workshop Template X 041218-Spea-Mari X Campaign Builder X Sales Force Autom X Inbox (67) - croo X Thank You | ONTRAP X Blueprints | The O X Events X ONTRAPORT | All- X @red

Secure | https://ontraport.com

Apps ★ Bookmarks From Sales To CEO MarketingSherpa Discover Which Mark The world's largest o courts.IN.gov: Child

Other bookmarks

ONTRAPORT FEATURES PRICING COMPANY RESOURCES PARTNERS 855-ONTRAPORT SIGN IN **GET STARTED**

YOUR MARKETING CAMPAIGNS AT-A-GLANCE

CAMPAIGN BUILDER

Find out what thou

GET A DEMO ▶

6:51

ONTRAPORT is the most powerful visual marketing automation and reporting platform in the world.

Chat With Us

Sales First Marketing.jpg ^ Introducing the Lat...j... ^ Introducing the Lat...j... ^

Show all X

“He who fails to plan is
planning to fail.”

– Winston Churchill

chad@yourspear.com

I'll send you a copy of the slides and point you toward other resources.