Your Buyer's Journey - Gain Visibility with Custom Objects

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Favorite Quote -

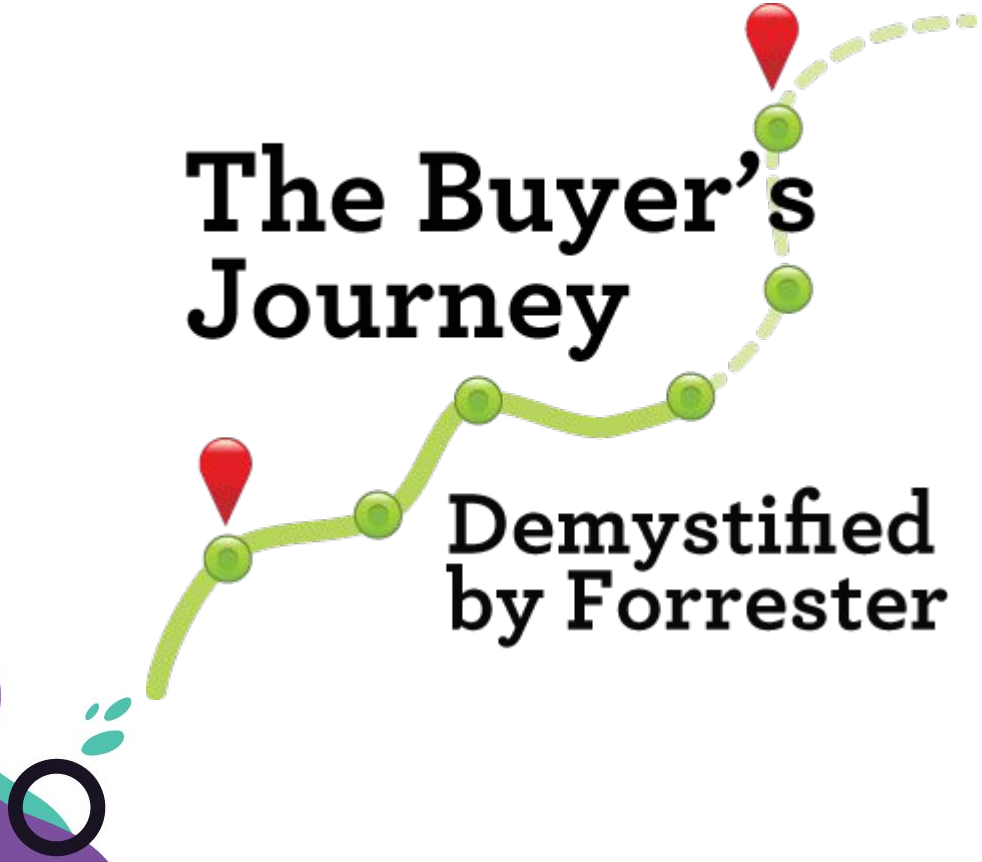
“Vision without action is a daydream.

Action without vision is a nightmare.”

Sales hides sins, but...

The Wrong CRM Will KILL Sales

The Buyer's Journey Demystified by Forrester

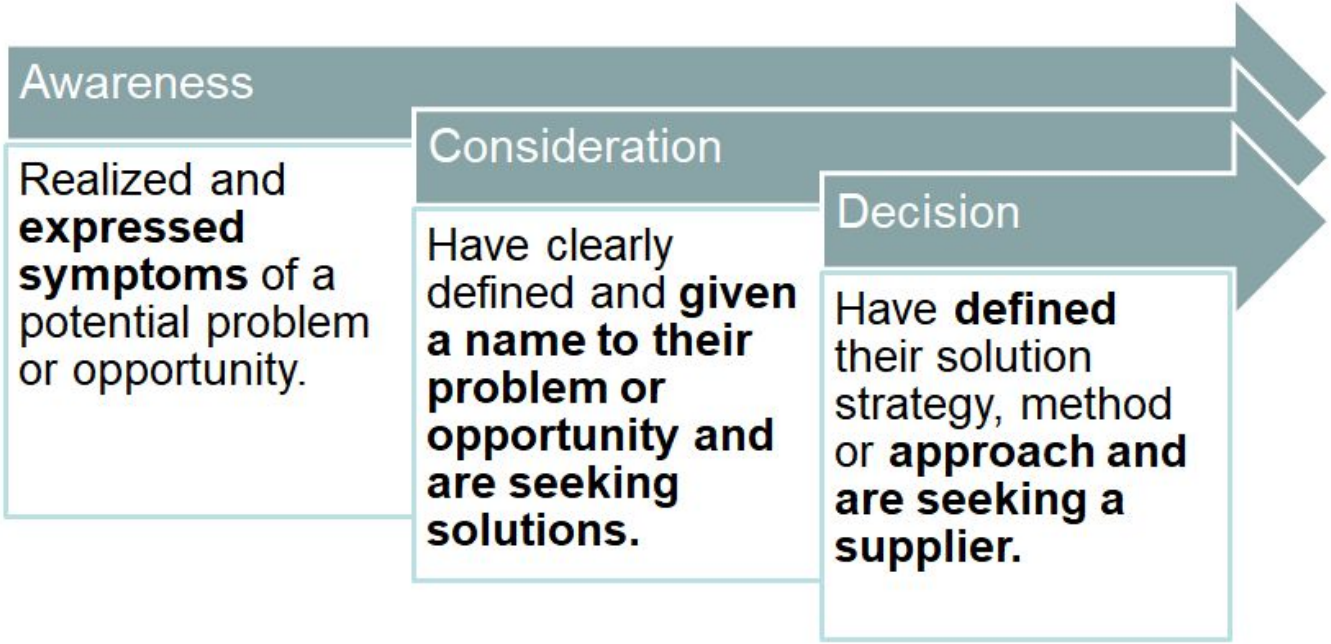


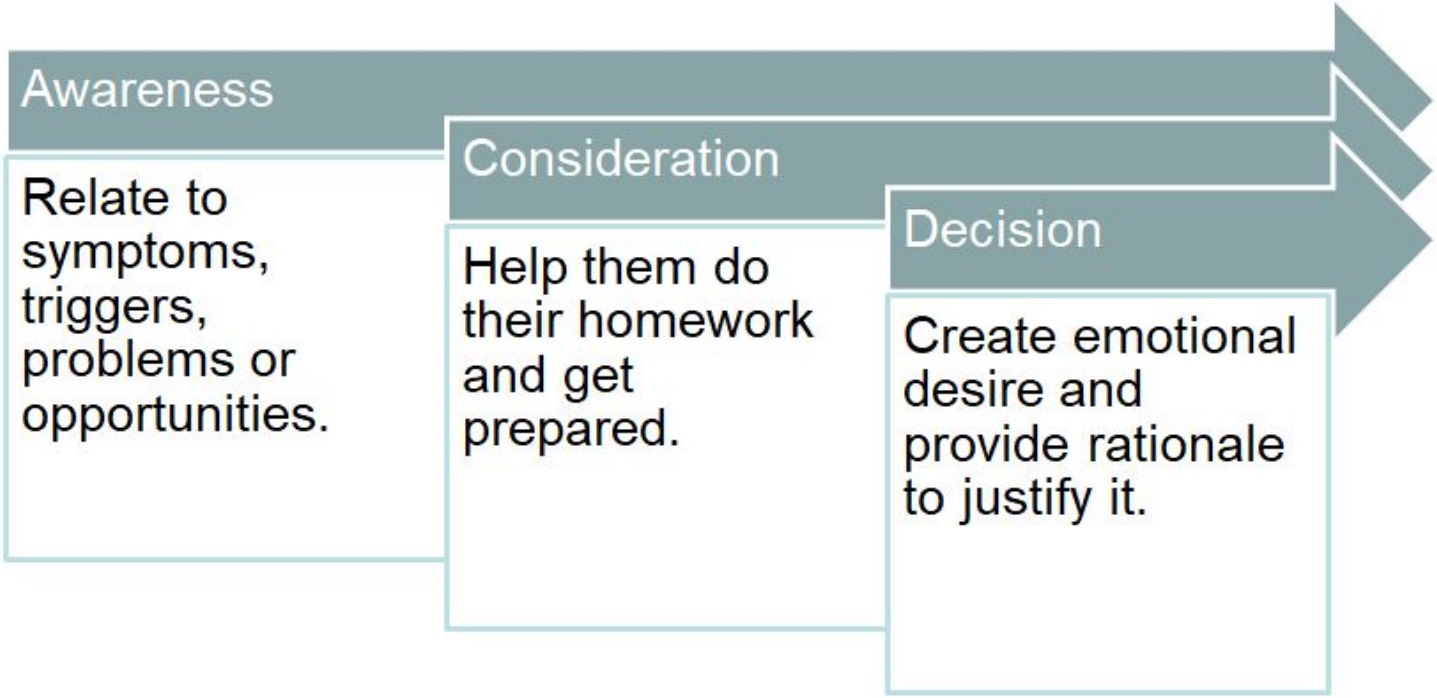
- 57% before talking to supplier (CEB/Gartner)
- Bottom Line - **We MUST see and choreograph the ENTIRE journey!**
- **You can't manage, what you can't see.**

Semantics

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

Buyer Journey

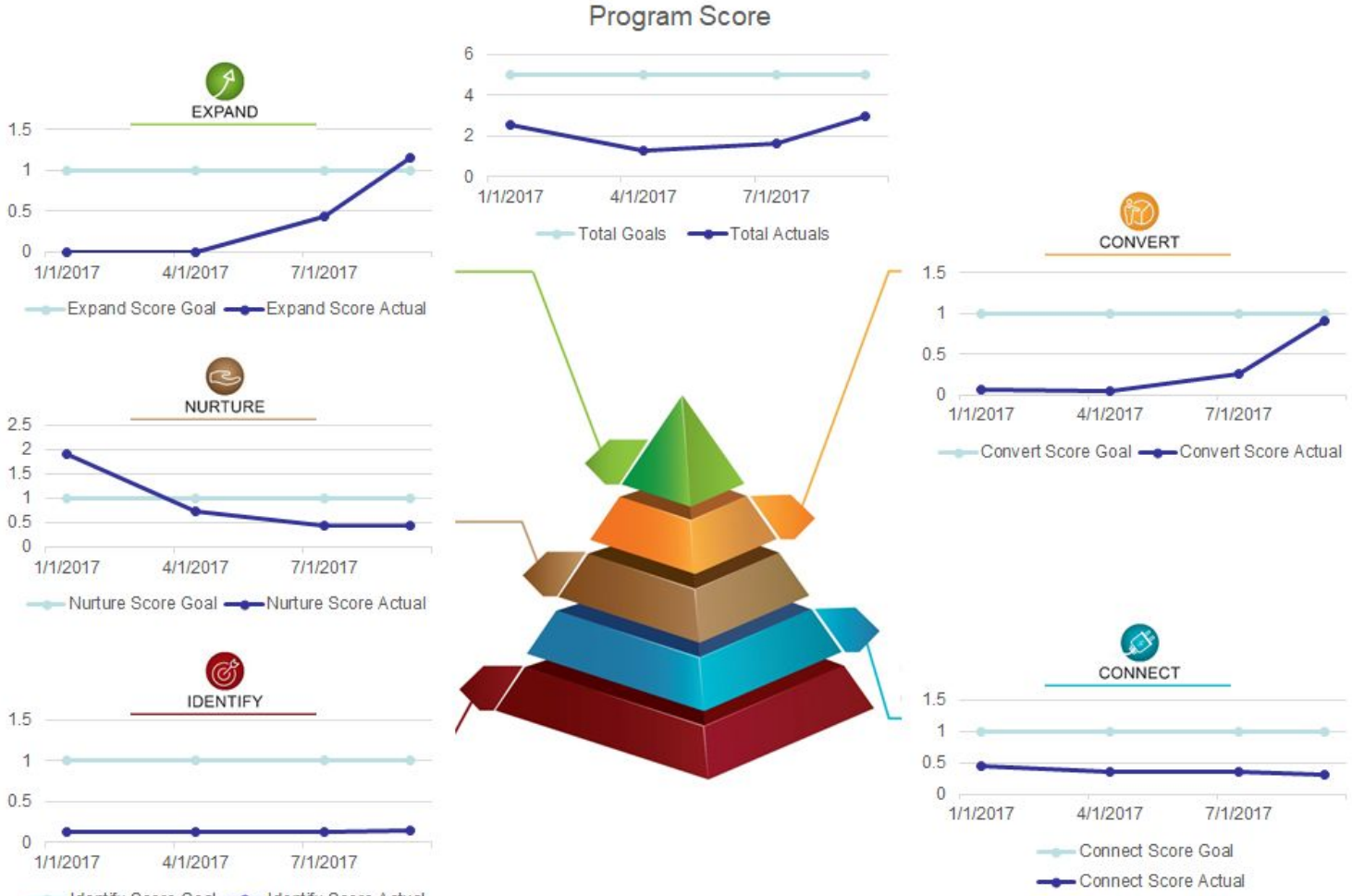




Category Level Content: Videos, eBooks, Getting Started Guides or "How to overcome/achieve…"	**Solution Set Call-to-Actions:** Planners, Idea Books, Before/After Stories, Pros/Cons, Do's/Don'ts or What X Costs	**Unique Value Proposition:** Sales Collateral, Featured Work/Testimony, ROI Calculators, Test Results or Comparison Tools
"Does Your Office Need a Makeover?"	"10 Tips for Best Office Layout"	"The XYZ Office Difference"

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	


Program Score
6
4
2
0
1/1/2017
4/1/2017
7/1/2017
Total Goals
Total Actuals
EXPAND
1.5
1
0.5
0
1/1/2017
4/1/2017
7/1/2017
Expand Score Goal
Expand Score Actual
CONVERT
1.5
1
0.5
0
1/1/2017
4/1/2017
7/1/2017
Convert Score Goal
Convert Score Actual
NURTURE
2.5
2
1.5
1
0.5
0
1/1/2017
4/1/2017
7/1/2017
Nurture Score Goal
Nurture Score Actual
CONNECT
1.5
1
0.5
0
1/1/2017
4/1/2017
7/1/2017
Connect Score Goal
Connect Score Actual
IDENTIFY
1.5
1
0.5
0
1/1/2017
4/1/2017
7/1/2017
Identify Score Goal
Identify Score Actual

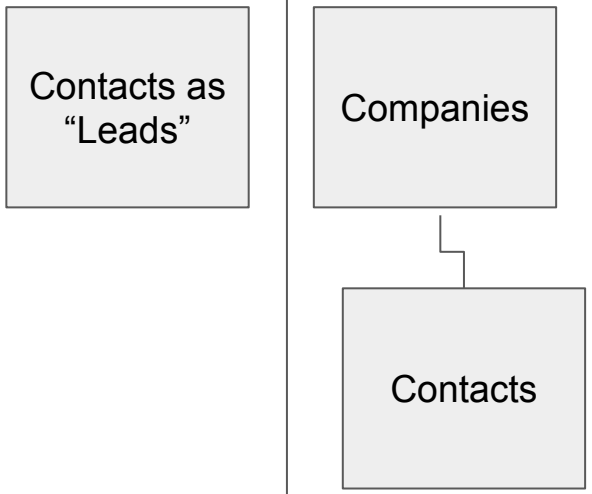
Example - Libart USA

- Division of Libart International
- Global Reach
- HQ in Istanbul, Turkey
- ~ 30 Kinetic Architecture Projects/YR in USA & Canada
- Dozens of Influencers per Project
- 6-36 Month Sales Cycle

NetSuite Eat Your Heart Out!

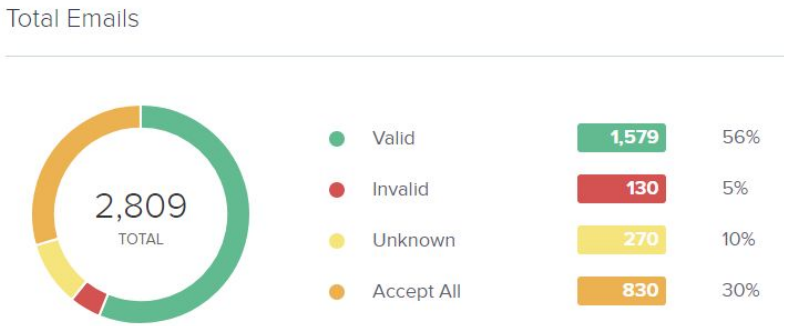
Most enterprise CRM's silo the lead data separate from Company:Contact data.

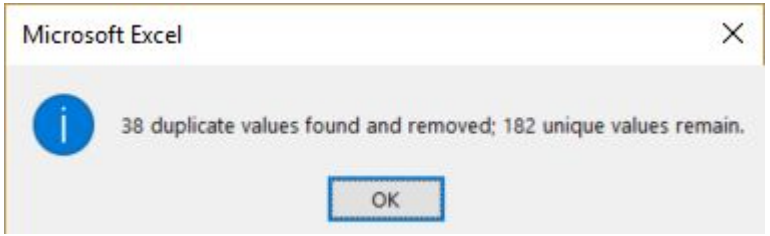
- Duplicate records with discrepancies
- If converted, when?
- Marketing vs. Sales "Departments"



API or Export/Import - Mission Impossible

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



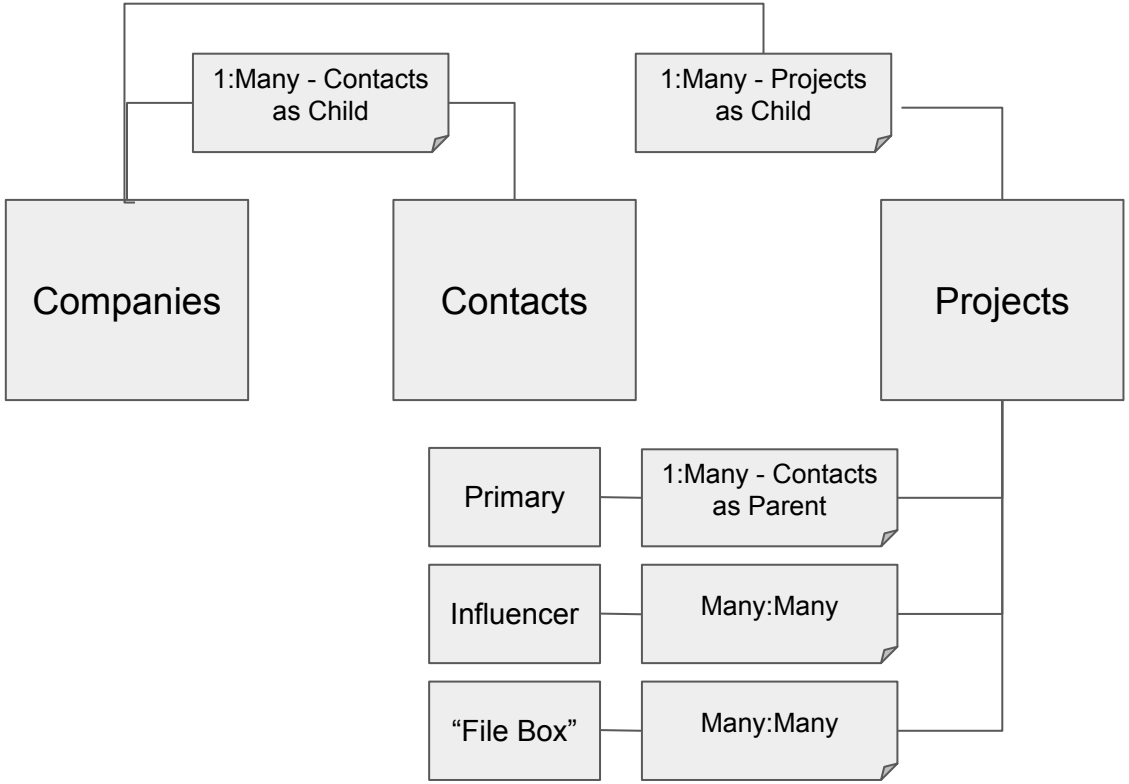


The Dreaded Pipeline Review Sales Meeting

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

The Answer for Libart - Custom Objects



Let’s Take a Look

Went live March 2018, so we have 6-mo’s tracking

Compare to prior 6-months:

- Projects Sold - Increased sales 100%
- Active Projects - Same
- Upcoming Projects - Increased 10% and Disqualifying Faster
- Immediate Visibility of Pipeline $Amount

Features

Will demo the account to show the following features:

- Custom Milestone Fields with Date Stamps
- Global Rules
- Links to Main Contacts, Influencers and File Box Records
- Inactive Project Campaign
- Automated Follow-up Campaigns w/ Reports

Bonus Features

Sister Companies in the Same Database

- Routing 1,000's of leads to dealers using Ping URL
- WooCommerce Auto Entry using WPFusion

THANK YOU

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ONTRAPALOOZA 2018
PRESENTATION INSTRUCTIONS

- Due by Sept. 5th, 2018
- Use the slide deck template provided by ONTRAPORT and add your content and suggested images. **DO NOT REARRANGE INDIVIDUAL SLIDE ELEMENTS.**

Keep text to a minimum. Each slide should include:

- Title: Approximately 20-30 characters.
- 2-5 bullets, no longer than 40 characters each

ONTRAPORT
BRAND STANDARDS

The content of your bio, presentations, images and all materials will be reviewed and revised to ensure it meets ONTRAPORT's brand standards and the requirements listed below. You will have the opportunity to review any changes made to your content and request one round of revisions.

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(set background image)
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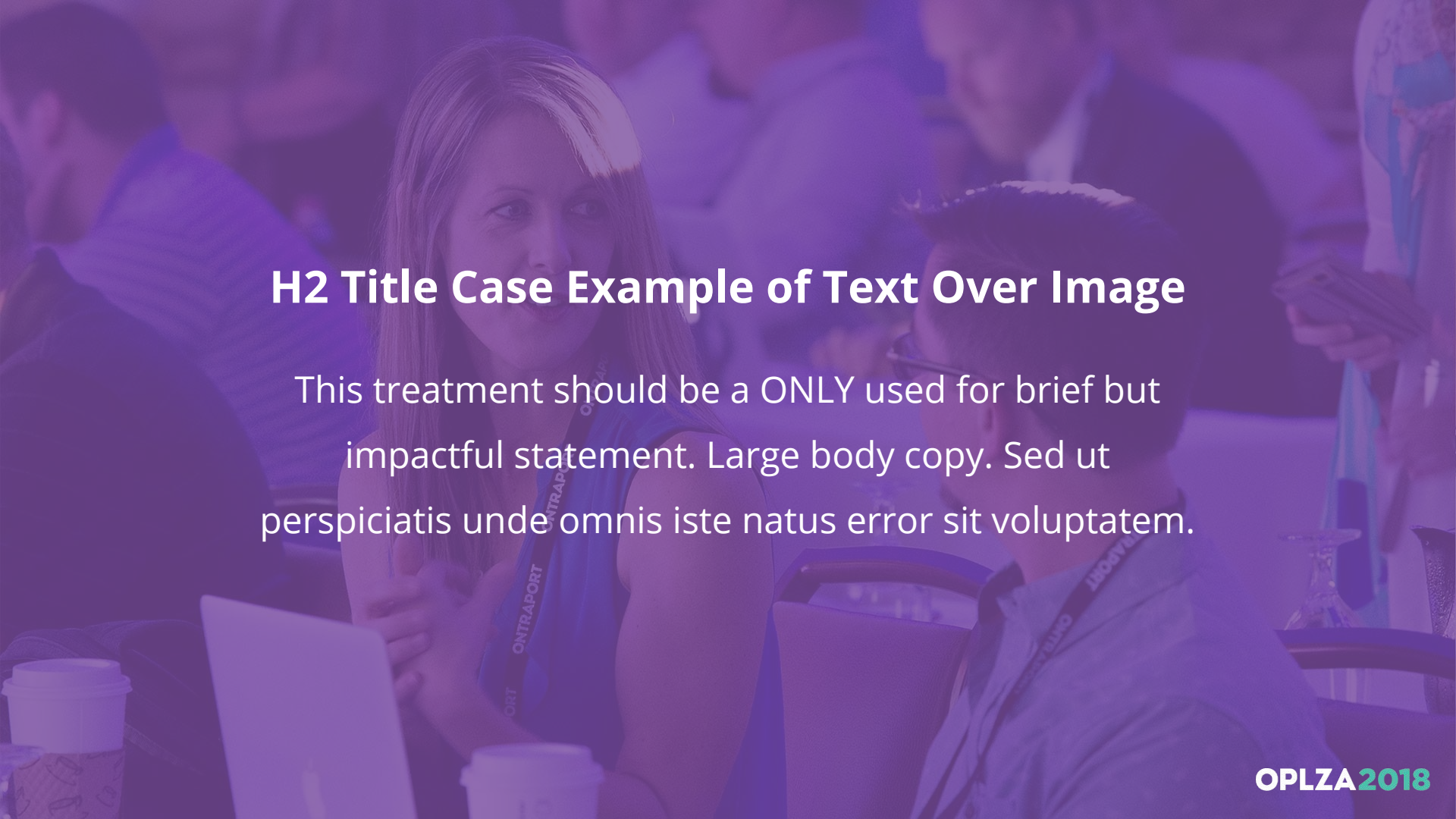
OPLZA2018



H2 Title Case Example of Text Over Image

This treatment should be a ONLY used for brief but impactful statement. Large body copy. Sed ut perspiciatis unde omnis iste natus error sit voluptatem.

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“

Important quote or callout can go like this over an image or on top of a standard slide background.

SOURCE NAME

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