
Establishing Your Company's Prospecting and Lead Generation System

Finding New Customers Using Compelling Offers



Implementation Plan

Establishing Your Prospecting and Lead Generation System—Part 1

- Choose Top 3 most profitable products or services—or those that generate maximum future sales
- Think through the target market for each of these Top 3 products or services
- Create a specific and compelling offer for each of these Top 3 products or services
- Select a marketing device and distribution method for each offer
- Use the Prospecting Campaign Planner starting on page 7 to implement a Top 3 campaign

Example:

Product	Target Market	Offer	Marketing Device	Distribution Method
"Weekend Makeover" Landscaping Package	Homeowners with smaller than 8,000-square-foot lot size	1,000 square feet of landscaping including professional drawings, clearing and removal, 12 foundation shrubs, 15-gallon tree and 200sf of sod for \$1995 (save 47%). Limited time offer. New clients only. Schedule work before June 30.	Direct mail brochure	Rented list of households with appropriate lot size
"Instant Lawn" Sod and Shrub Package	Homeowners with larger than 8,000-square-foot lot size	1,000 square feet of landscaping including professional drawings, clearing and removal, sprinklers, topsoil, 800 square feet of sod, and 12 foundation shrubs for \$2,995 (save 28%). Limited time offer. Schedule work before June 30.	Voice broadcasting	Rented list of households with appropriate lot size
"Backyard Beauty" Condominium Package	Condominium, duplex and townhome owners with front atrium or small backyard spaces	400 square feet of landscaping including clearing and removal, automatic water system, 8 flowering shrubs, and 4 flats of color plants for \$895 (save 35%). Limited time offer. New clients only. Schedule work before June 30.	Oversized postcard	Rented list of multi-dwelling households with front atrium and/or small backyard space

Product 1: Prospecting and Lead Generation Plan

Name of Product, Service, Package, Contract or Subscription _____

Target Market _____

What needs/wants do they have and what benefits are they looking for, either tangible or intangible?

At what point in time do they make a buying decision? How can we reach them at that time?

Offer to be featured in marketing campaign (i.e., goods, services, bonus, delivery, price, terms, intangible benefits)

Call-to-Action (how should prospect respond?) _____

Our company's Unique Selling Proposition that will be featured in the marketing campaign _____

Marketing device to be used _____
(i.e., newspaper advertisement, direct mail letter, etc.)

Marketing device to be distributed how? _____
(example: Star Gazette newspaper, rented list of homeowners in local zip codes, Jason Whitmore's clients)

How will responses be tracked? _____

Product 2: Prospecting and Lead Generation Plan

Name of Product, Service, Package, Contract or Subscription _____

Target Market _____

What needs/wants do they have and what benefits are they looking for, either tangible or intangible?

At what point in time do they make a buying decision? How can we reach them at that time?

Offer to be featured in marketing campaign (i.e., goods, services, bonus, delivery, price, terms, intangible benefits)

Call-to-Action (how should prospect respond?) _____

Our company's Unique Selling Proposition that will be featured in the marketing campaign _____

Marketing device to be used _____
(i.e., newspaper advertisement, direct mail letter, etc.)

Marketing device to be distributed how? _____
(example: Star Gazette newspaper, rented list of homeowners in local zip codes, Jason Whitmore's clients)

How will responses be tracked? _____

Product 3: Prospecting and Lead Generation Plan

Name of Product, Service, Package, Contract or Subscription _____

Target Market _____

What needs/wants do they have and what benefits are they looking for, either tangible or intangible?

At what point in time do they make a buying decision? How can we reach them at that time?

Offer to be featured in marketing campaign (i.e., goods, services, bonus, delivery, price, terms, intangible benefits)

Call-to-Action (how should prospect respond?) _____

Our company's Unique Selling Proposition that will be featured in the marketing campaign _____

Marketing device to be used _____
(i.e., newspaper advertisement, direct mail letter, endorsement email from referral partner, etc.)

Marketing device to be distributed how? _____
(example: Star Gazette newspaper, rented list of homeowners in local zip codes, Jason Whitmore's clients)

How will responses be tracked? _____

Prospecting Campaign Planner

1. Product, service or free giveaway to be promoted in this campaign:

2. Ideal prospect you want to promote to?

Ex: Day spa owners, home remodeling companies, high-net worth individuals, working moms, direct sellers, etc.

3. Which prospecting method will you use?

- | | | |
|---|---|---|
| <input type="checkbox"/> Display advertising | <input type="checkbox"/> Radio spots | <input type="checkbox"/> Preview workshops |
| <input type="checkbox"/> Trade shows | <input type="checkbox"/> Direct mail | <input type="checkbox"/> Speaking engagements |
| <input type="checkbox"/> Teleseminar | <input type="checkbox"/> Literature in targeted locations | <input type="checkbox"/> Gift registry |
| <input type="checkbox"/> Sidewalk signs for local traffic | <input type="checkbox"/> Referral programs | |

Other _____

4. What information do you need to gather about that prospecting method?

Such as display advertising rates, radio scheduling deadlines, quotes from a mailing service, postage rates, available speaking dates for your industry, booth requirements for a trade show, etc.

5. What is the price of the product or service being promoted? _____

6. How will you direct buyers to respond? How will the money be collected?

Will buyers call your office or go to your website? Will your joint-venture partner collect funds? Will buyers pay by check, credit card or other method? Do you need to set up a merchant account, a PayPal business account, or other service in order to speed up the sale?

7. What marketing materials, sales scripts, display advertisements or other devices will you need to produce?

Does any of this material exist already that you could simply repurpose or improve upon? If you must write new materials or ads, what will the message be?

8. What information will you need to gather in order to produce these materials?

Will you need to interview customers, gather customer-service statistics, refer to product data sheets or gather other information?

9. What offer will you make?

Straight sale offer (price/terms in advertisement) Two-step offer / offering what? _____

Price _____

Payment terms _____

Price is a good value compared to what? _____

Bonuses with purchase _____

Guarantee _____

Time limit of price or terms _____

Limited number of units available _____

Other aspects of offer _____

10. What do you need to know or do in order to execute the campaign?

Do you need to compile your customers' email addresses? Do you need to call the local newspaper to check on remnant advertising rates? Do need to ask if your sales team has updated phone numbers in order to do follow-up? What questions do you need to ask?

11. Create your task list.

Use the template below to plan all tasks of your promotion.

14. Decide who will implement each part of the campaign

Keep track of everyone involved in your plans, along with a brief note about their responsibilities. Check with them frequently to make sure they are prepared to carry out their duties.

Name	Contact Information	Participation or Responsibilities
_____	_____	_____
How will this person help? _____		

Name	Contact Information	Participation or Responsibilities
_____	_____	_____
How will this person help? _____		

Name	Contact Information	Participation or Responsibilities
_____	_____	_____
How will this person help? _____		

Name	Contact Information	Participation or Responsibilities
_____	_____	_____
How will this person help? _____		

Name	Contact Information	Participation or Responsibilities
_____	_____	_____
How will this person help? _____		

Name	Contact Information	Participation or Responsibilities
_____	_____	_____
How will this person help? _____		

Salutation

In printed ads and letters, how will you address the prospect? Will it be personalized with their name or will you use some other salutation such as Dear New Homeowner?

Opening or lead paragraph

Why are you writing the prospect? Might your own personal story mirror their situation? Can you have someone else write to introduce you to the prospect? Can you abolish a myth or negate a commonly believed statistic?

Body Copy

Outline below the paragraphs you'll write or the topics you'll include in a sales script or teleseminar. What benefits do you need to talk about? List at least three including superior services provided, mechanical superiority of the item, advantageous financing or other benefits.

- 1.

- 2.

- 3.

- 4.

- 5.

6. _____

7. _____

8. _____

9. _____

10. _____

Internal subheadlines

How can you communicate the entire message, offer, benefits and other compelling information using subheads that prospects might skim before reading your entire marketing piece?

1. _____

2. _____

3. _____

4. _____

5. _____

Testimonials and media mentions

Which positive comments and media mentions can you use to support your marketing copy, claims and offer? Which customers can you call to solicit a testimonial or comment?

Name	Contact Information	Subject of Customer Testimonial or Media Mention
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Offer

How will you make your product, service, package, bonuses, guarantee, add-ons, upsells—and most importantly, price—supremely compelling to the prospect reading or hearing your marketing appeal.

Price _____

Price justification _____

Price compared to what? _____

Testimonial or case study from customer who paid that price and benefited _____

Payment terms _____

Bonuses with purchase _____

Guarantee _____

Time limit of price or terms _____

Limited number of units available _____

Other aspects of offer _____

Call-to-action (CTA)

How should your prospect respond in order to make a purchase. You must tell them how. And the call-to-action section of your appeal is that "how-to" language.

Rationale

Why are you making this offer? Why are you making this offer now? Why are you making this offer at this price? Beyond just "making money," the rationale gives the prospect the reason why.

Answer objections

Most prospective buyers have some objections to overcome. What are the most common objections, based on your experience? How will you address these in your marketing appeal and answer them with honest, forthright information and compelling proof to the contrary?

Objection 1. _____

Answer: _____

Objection 2. _____

Answer: _____

Objection 3. _____

Answer: _____

Objection 4. _____

Answer: _____

Bullets

What will prospects receive when they buy? What are the key benefits they'll enjoy from owning your product or service? How will their life or business change for the better? Communicate these benefits using bullets.

- 1. _____

- 2. _____

- 3. _____

- 4. _____

- 5. _____

- 6. _____

- 7. _____

- 8. _____

- 9. _____

- 10. _____

Upsell offer

If you will be offering an add-on or upsell item, describe it in the copy and be sure to provide justification for the additional amount of money your prospect will spend.

Add-on or upgraded package to be offered _____

Price of upgraded item _____

Justification of higher price _____

Describe extraordinary value of the extra item and additional benefits _____

The Close

Remind readers how to respond by repeating the phone number to call, the website to visit, and so on.

Signature block

Who will sign the letter? Is it your endorser? Or yourself? Or perhaps a member of your own staff or a co-worker? If a staff member will sign, what will their title be?

Postscript

Restate why you're writing including repeating your rationale for why you're making the offer. Restate the major benefits of your offer and remind prospects how to respond.

Restate why you're writing _____

Restate your rationale (i.e., why are you making the offer you're making?) _____

Restate the offer _____

Remind the prospect how to respond (i.e., pick up the phone and call, click through to our website, etc.)

16. Plan tasks for Launch Day

Make plans here so that on Launch Day, you can review your notes, re-check your marketing materials, make sure everything functions properly—then—launch your strategy.

a. Before you do anything else today, make sure all systems are “go” for bringing in the cash.

Verify that your order-taking system, your response mechanism, your shopping cart, order desk, store clerks and other “money systems” are functioning properly and ready to accept cash, checks and credit cards from buyers. Focus first on bringing in the cash.

b. Broadcast your email, run your newspaper ad, begin telemarketing or otherwise distribute your offer.

Double-check with the vendors who are helping you broadcast or otherwise distribute your marketing message and offer. Alert anyone helping you by telling them when the mailing drops, when the email is broadcast, when the press release goes out or when other distribution occurs. Help the order-taking staff anticipate when the first orders might come in.

c. Be certain your fulfillment or product delivery systems are ready to promptly ship or deliver your product or service to the customer.

If you need to stock extra units of your product or have new-customer welcome packages ready to send or distribute in your retail store, take steps today to be sure everything will be delivered promptly—or at least inform the buyer when they can expect delivery. If you must deliver something later (or schedule a service later than the next few days), be sure to have something that reassures the customer they have made a wise purchase. This post-purchase reassurance package will help cut down on cancelled orders and returns.

d. Refine your sales script or order mechanism as the response comes in.

Good salespeople know that their first script is often not the one they ultimately use to close the most sales. As the day goes by, work with your salespeople (or your own notes) to refine the language you use to achieve a sale. Take careful notes so you can use this refined sales pitch, telemarketing script, or upsell technique later.

e. Keep track of sales as they occur.

Keep careful notes about how your strategy “rolls out” so you can replicate it later, if desired.

17. Make plans to follow up with leads or execute a follow-up strategy

As long as you’re prepared and ready to deliver your product or service, why not maximize your effort by generating as many prospects as possible and converting as many of them into customers as possible?

To leverage the effort you’ve already made, (1) follow up with any prospects as they are generated by your campaign, then (2) consider generating even more prospects by running a second strategy such as an email broadcast to additional addresses, letter sent to a second joint-venture partner’s list, another newspaper ad in the same newspaper or a second paper, and so on.

Ideally, you should—at the very least—follow up aggressively with the prospects you generate, either by conducting a telemarketing campaign to prospects who provide their phone number, by sending a “thank you” email to prospects who called or visited, by broadcasting a voice-mail message in your own voice.

Write a telemarketing script that re-engages your prospects in conversation.

Review Chapter 5 in the book, Instant Income to help you write a script that converts prospects to buyers.
