



# Focus on Your Funnel

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Tips to market your business, get more prospects, "WOW!" your new clients, and retain them for the long-run.



**CONSTANT CONTACT SOLUTION PROVIDER PROGRAM**

partnersupport@constantcontact.com | Mon-Fri 9am-8pm ET 1-866-811-1344 (US & CA) | Mon-Fri 2pm-8pm 0800 096 9279 (UK)

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## What is the “funnel?”

Simply put, the funnel is a structure—a business tool—that you can use to represent the flow of leads to customers. When you analyze your own funnel, you can prioritize tactics and campaigns to increase the impact of your marketing on your business.



## How to Use this Workbook

1. This workbook is full of tactics—ideas—that you can use to improve your business at all stages of the sales funnel. Note which tactics most apply to your business—this is by no means a complete list, so feel free to add your own!
2. Next, calculate your funnel metrics to get a baseline of how your current marketing activities are performing.
3. Set goals to improve your funnel metrics.
4. Look back at the tactics, metrics, and goals you just set—assign a timeframe to deploy the tactics you identified.



## Generating new Leads

*The top of the funnel is where you seek to create awareness and demand in order to generate leads. These could be leads you develop from your attendance at events like trade shows, presentations (that you deliver), or networking receptions. You can even generate leads from referrals or through optimizing your website to make it easier for leads to find you!*

**Consider running your own event.** Holding an event takes effort, but it’s a great way for you to help clients meet their goals.

**Make it easy for prospects to find you.** Whether someone is searching for your individual business or the answer to a problem that only your business can solve, taking steps to improve your visibility on [search engines](#) and [social media sites](#) will make it easy for your next great client to find you. [Here are some additional tips](#) to help you get found on Google.

**Ask for referrals.** Word-of-mouth marketing is one of the most powerful sources of new business, so think back to all of the clients you’ve helped. Chances are that they have other small business owners in their networks who might need your marketing services. [Don’t be afraid to ask!](#)

**Attend a trade show or sponsor an event.** Chances are, there are events coming up in your local area that will be an opportunity for you to showcase your business. [Here are eight tips](#) to get more leads at trade shows.

**Write a blog.** You may already have an email newsletter, but a [blog doesn’t have to add to your marketing to-do list](#). In fact, a blog can allow you to get more from the work you’re already doing. It can help boost your ranking on search engines, it can give you more opportunities for engagement outside of the inbox, and it can give you a better sense of who is reading your content!





## Nurturing Prospects

*Prospects started out as leads that you followed up with and qualified to be eligible or interested in your services. They could be meeting with you for a free consultation, or they could be taking advantage of samples of your services, or even content that you're sharing for free. In this stage of the funnel, you should be focusing on showing your value to them so they want to become a paying client.*

### Engage your prospects via an automated email nurture flow.

When prospects sign up for your mailing list, provide them with helpful and relevant content via an email nurture flow. In fact, you can even automate this process with an [Autoresponder series](#). You can also navigate to the "Partner Marketing Templates" section of your [account's template picker](#)—we've included many customizable templates that you can send to your leads, your prospects, and even your current clients.

**Call your trialers right away.** Getting in touch with your new trialers is a key first step toward getting them to convert (and stay with you for the long run)! In your first call, you'll want to thank them for starting a trial, understand their goals, and work toward getting their first email sent.

**Print out our case studies and customizable product sell sheets to share with your prospects.** Browse our [case study archive](#) to read how Constant Contact is working for Solution Providers like you, and clients like yours. [These customizable sell-sheets](#) make for a great leave-behind after a prospect meeting or as a sales aid when positioning Constant Contact (includes several file formats).

**Need help closing that sale?** Our [Constant Contact Sales Cycle Guide](#) guide will walk you through some sales tactics to help you to uncover your clients' needs and pitch additional services. If they're not ready to buy, start them off with a free trial of Constant Contact—our [Trial Guide](#) will show you how. If you need additional sales advice, your Account Manager is available to help you.



## Creating a Great Experience for New Clients

*Congratulations—you've brought your prospect on board as a new client! It's important to understand your new customer experience so your client is excited and confident about working with you.*

**Inspire your new clients with content ideas.** Our [Email and Email Plus Vertical Use Cases Guide](#) will provide you (and your clients) with email marketing content ideas and schedules for 19 different verticals and industries.

**Show your clients that you're thinking about them.** Regularly share interesting content to get them thinking about important [upcoming holidays/themes](#), industry trends, or just to pass along an idea you had about how to grow their business.

**Think about it from their perspective.** What types of initial questions or concerns might they have? If they've signed on with you for an extended period of time, what types of campaigns or services do you have planned? The more prepared you are to anticipate their needs and questions, the more they'll see you as an integral part of their business's marketing efforts.

**WOW! your clients right out of the gate.** WOW! moments, no matter how big or how small, can play a critical role in building customer relationships, which can lead to repeat business and valuable word-of-mouth referrals. Here are a few resources to help you create a WOW! moment right away:

- [20 Ideas to WOW Your Customers, Improve Loyalty, and Get People Talking About Your Business](#)
- [Why Repeat Business is Not an Accident](#)
- [How Do You WOW! Your Customers?](#)
- [The Essence of WOW! and its Impact on Profit](#)





## Providing Value through Ongoing Jobs

*The final stage is where your ongoing jobs will be. This is where you focus on providing top-level service to retain your clients over time, and where the idea of “holistic marketing and service delivery” starts to apply. As you learn what the needs of your clients are beyond the initial reason they hired you, you’ll find opportunities to offer them more and varied services.*

**Package and price your services.** Our [Marketing Services Guide](#) can teach you more about packaging and pricing your marketing services with Constant Contact products. Our [Statement of Work Template](#) will help you build a comprehensive service offering that you can sell to your clients.

**Deliver more to your clients.** We even have how-to guides to walk you through delivering the following types of Constant Contact-related services for your clients:

- [Offering an Automated Email Service](#)
- [Offering an Email Newsletter Service](#)
- Develop a donation campaign for a Non-Profit client using the [Donations Action Block](#).

**Follow up and share successes.** By now, you’ve likely put some campaigns out into market for your clients—but that doesn’t mean the work is done. [Be sure to follow up](#) with your clients to discuss how the campaign performed, both in terms of [digital metrics](#) like [click-through rate](#), and physical metrics like how many customers visited your client’s business after being exposed to the campaign. This is a great way for you to continue to show value, and it opens the door for you to provide additional services!

**Retention is key!** You’ve put a lot of effort in attracting, nurturing, and providing WOW! moments to your clients—now keep them coming back.

- [Keep Your Customers Happy First](#)
- [A Simple Approach to Conducting Customer Research](#)



## Make the funnel your own: What tactics can you apply to your business?

*Now that you’re a funnel expert, what activities can you conduct at each stage of the funnel? Jot down your own ideas, and some from this guide.*

Funnel Stage	Tactic to Implement
Leads	Conduct a monthly webinar to attract leads.

Funnel Stage	Tactic to Implement



## Funnel Metrics

One of the greatest benefits of the funnel is in how it can quickly allow you to see where you're doing well, and prompt questions about where you may be falling behind. You might be out there networking and adding a lot of leads into the top of the funnel, but if you don't respond to anybody or manage the next stage, you're not going to get anywhere!

If you're not always thinking holistically in every part of the funnel, you may not be aware that you're actually hurting or not optimizing your business in another part of the funnel.

**Take a look at the example below.** By comparing their monthly average to their actuals this month, this Solution Provider can see that their lead-to-prospect conversions are down, while their prospect-to-client conversions are up. When they calculated their net new clients, we see that they're above their average!

Now that the Solution Provider in this example understands their metrics, they're able to develop questions to dive deeper to see why something is or is not working at each stage of their funnel.

Average (Per Month)	Average Conversion %	What did you do at each stage of the funnel this month?	This Month Actual	This Month Conversion %	Questions
50	n/a	Generated leads from events and referrals.	100	n/a	How did I drive more leads this month? Should I attend similar events?
20	40% = $(20 \div 50) \times 100$	Prospects who told me they wanted to receive my newsletter.	15	15% = $(15 \div 100) \times 100$	Was I quick enough with following up? Did I attract unqualified leads?
7	35% = $(7 \div 20) \times 100$	Signed up new clients for my marketing service package.	6	40% = $(6 \div 15) \times 100$	My conversion rate went up—how can I continue to optimize my clients' onboarding experience?
-3	n/a	Existing clients who ended their engagement with me.	-1	n/a	Are my existing clients more satisfied? Can I survey them to find out?
<b>(7-3) = 4</b> Net New Clients			<b>(6-1) = 5</b> Net New Clients		



## Make the funnel your own: Know your metrics.

Average (Per Month)	Average Conversion %	What did you do at each stage of the funnel this month?	This Month Actual	This Month Conversion %	Questions
	n/a			n/a	
	n/a			n/a	
	Net New Clients			Net New Clients	



## Make the funnel your own: Understand your goals.

*Now that you know your funnel metrics and have written down some questions to further research your metrics, it's time to set goals for yourself. Below, respond to the questions above each box—this will better help you understand what you'll need at each funnel stage to achieve your goals.*

*How many leads do you need to enter the top of your funnel every month? How will you get them there?*

*How many leads do you need to convert to prospects? What activities will you use to convert them?*

*How many prospects do you need to convert to clients? How will you convert them? How will you initially engage with your new clients?*

*How many clients do you need to retain each month? What retention efforts will you make? How will you build and show loyalty? How many can you afford to lose each month and know you're still covered by the inflow at the top of your funnel?*





## Make the funnel your own: Set a plan.

Take a look back at your tactics, metrics, and goals. The next step is to decide when you will execute the tactics you identified earlier in this workbook. You can organize these by month, by quarter, or with non-specific timing as we did for you below.

When?

What will you execute on?

**Soon**

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**Later**

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**Much  
Later**

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