

**RECORD** ALL YOUR CUSTOMER DATA WITHIN A CRM SYSTEM



BONUS WORK BOOK THREE



**COACHING ACADEMY SPECIALIST**  
**Where Small Businesses Grow**

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

*“The fastest way to change yourself is to hang out with people who are already the way you want to be.”*

– Reid Hoffman, Co-founder LinkedIn

**Record all your Data within a splendid CRM system which will become a massive asset of your business.**

If you are selling your business or borrowing money, your prospective investor or banker will ask “what pipeline business do you have?” They are asking “where are tomorrows customers coming from?”

You must acquire a robust and reliable Customer Relationship Management (CRM) System as you build your own unique database of prospective customers. A potential buyer for your business will pay a premium when he is convinced of the future good opportunity for growth in your business.

If you are working in a high sales environment, how do you know which contacts are cold leads and which are hot prospects? There comes a point where you have too much information and too many people along different stages of the sales process to keep it all clear in your head.

**This is where a good customer relationship management system (CRM) can help.**

Using a CRM system you can instantly see whether a particular person is a lead or a prospect and take the appropriate action. A CRM system will also give you much more detail on the individual’s progress through your sales funnel. A contact may be categorised as a prospect and when you enter their record you will be able to see which product they are interested in, the last email you sent them about that product, any follow up calls you made (and corresponding notes) and perhaps a note to call them on a given date to finalise the purchase.

## Step 3

### Lead Generation Made Simple

### The P.E.R.F.E.C.T Method - R - RECORD

### Continued....

You'll also be able to use the CRM system to determine:

- **The number of new relationships by source (e.g. telephone, website, tradeshow, referral or wherever).**
- **Last contact made with prospect.**
- **Leads not contacted and**
- **Scheduled tasks for prospects and leads.**

You can use this to get a snapshot of your business. And more importantly what you or your team can do to improve your revenue today. Are there any prospects waiting for more information? Which leads haven't been contacted yet? What prospects need a little nudge (perhaps a follow up call) to close a sale?

It is frequently said that Information is power, but in reality it is the use of this information that gives you power, and by having a better understanding of what a lead and prospect is, your team can work more efficiently to turn them all into customers.

Be aware that getting a lot of leads also means that you need an efficient system for handling them, and dealing with them in the future. It may be best to find a software program designed to handle multiple contacts with a large number of individual names on a database list.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Continued....

Keep in mind that you may be mailing each responder up to a dozen marketing messages—if there are hundreds, for example, keeping track of who is getting what and how many times can quickly become a significant logistical challenge. You'll also be dealing with responses, perhaps requests for additional information, and any number of other kinds of follow-up contacts.

**Thus, what's needed is an easy-to-use, efficient database management system.**

Consult with a computer or software dealer to recommend a system based on what best suits your specific needs. This is where leveraging the expertise of others will be of enormous benefit. The more automated the response and fulfilment process, the easier the effort will proceed, and the faster you can get down to the real business of selling your services.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Multiple Contacts Is Key

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Generating large numbers of leads is, in many respects, the easiest part of marketing and selling products.

#### **Making the actual sale is more difficult.**

You should try to secure the client at the first meeting but experienced and successful entrepreneurs will tell you: Prospects, who don't make a purchase on first contact, may purchase on a second or third contact.

All experienced sales professionals know that the first time a customer says "No" is really an opportunity to set up the actual sale. It takes persistent and multiple contacts to achieve a high percentage of sales proportional to the number of leads received.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

### Create Your Own Invaluable Incubator Of Hot Prospects

Follow-up can also be done in a number of ways, including sales letters, telephone contact, email, live face to face visit, or whatever tools you have at your disposal to sell the prospects that have responded to your advertorial and special report.

Keep in mind, the fact that someone has responded to your requested information means that they have demonstrated an interest in what we are selling. People that respond to advertorials and special reports are 'highly qualified'—yet, it may take some persistence to sell them in the end.

While you can go out and pay good money to buy lists, you also have the power to create your own. When you buy a list, you are buying someone else's list, you need to build your own unique list. Every customer who answers your ads, responds to your sales letter, or comes into your store has a name, and you should have a system in place for not only capturing that name, but all additional data associated with that name as you can muster.

Gathering names that is keyed to buying behaviour has become a high-tech science, but is also somewhat controversial. Laser scanners in check-out lines, for example, can automatically capture all of the information on a customer's credit card and store it electronically. It can also key customer names to specific products they buy. So when a person goes to the same supermarket over a period of several months, an entire data base of that person's buying behaviour can be automatically tracked and stored in customer list files, which marketers can then examine at their leisure for the purpose of shaping and directing future marketing messages at those individuals.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

### Create Your Own Invaluable Incubator Of Hot Prospects/Continued....

I say it's somewhat controversial because, increasingly, privacy issues are involved. Some people feel uncomfortable with major or even minor corporations that are subtly and automatically building up detailed personality profiles on individuals by tracking their buying habits and behaviours.

**Also, the crime of identity theft is the fastest growing kind of offence in the world!**

Because of this, people are increasingly leery of giving personal information and additional data about themselves to anyone, including honest people like ourselves who only want to sell them good products and services.

Taking all of this into account, you should still have a plan to capture as many names as possible and build your own customer list and data base. Computer technology makes it easier than ever before. Ask your software and computer dealer for the equipment you need to capture and manage customer information.

**A personal touch still has a place in our world**

That means getting your sales people to ask people for their names and addresses, along with the strong reassurance that you will never sell, share or use their personal information for anything other than for interaction with your business. The majority of people are still glad to do it.

Direct mail is an easy way to capture names and other vital information because people need to fill out your order form and list all of their information when they send it in to buy.

**But another good way to capture names is to run contests and conduct surveys.**

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

### Create Your Own Invaluable Incubator Of Hot Prospects/Continued....

Many people will happily fill out your form in exchange for a chance to win something of value. When you use a survey, you can combine valuable marketing research efforts with gathering names.

#### **Have a plan for gathering names and building a customer mailing list.**

Ask any experienced, successful marketer and he or she will tell you—their “house mailing list” is their most precious commodity. Indeed arguably, the most valuable asset in any business is the customer list and, as has been discussed in other chapters, the closeness of the relationship that the business has to that customer list.

**Working the list consistently can be a source of incredible income for many years to come.**

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Segmenting Your Database

Speaking of your list, it can be organised in many ways, such as by active customers, high spending customers, recently inactive customers, lapsed customers and more. Your lists can also be segmented by average amount of purchase, or type of purchase made.

**Again, it's modern software to the rescue.!**

Ask your software dealer for a program that will not only store your customer data, but allow you to easily and effortlessly examine the information from multiple angles at the stroke of a few keys. "Massaging" your customer data can help you find trends, spot buying patterns and make you see opportunities for more sales you may not have ever thought of before. When it comes to manipulating customer data, knowledge is truly power. I don't mean to make this sound sinister—anything but.

**Another important aspect of customer segmentation is in the way that you can use it for strategically building your business.**

Here's what I mean. A medium sized accountancy firm with a staff of around twelve was having some difficulty growing. One of their main stumbling blocks was that they couldn't take on any more clients because the two partners were finding it difficult to provide a quality service with the large clientele they already had.

The answer was to segment the customers into three lists: A, B and C. 'A's' were the largest fee earners, 'B's' were next in line, that also showed growth potential and the 'C's' were small businesses and low fee earners.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Segmenting Your Database/Continued....

As a result of this simple segmentation, a strategy was formulated for the partners to concentrate on 'A' clients – where the big money was and 'B's' and 'C's' were managed by staff who became account specialists, devoted to these clients. Suddenly the partners had more productive time available and the business could increase its client base enormously.

**The purpose of your customer data and the patterns it reveals furthers your goal of finding out what people like and want, providing it for them, making them happy, while you increase your opportunity to make more sales.**

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### How To Choose A CRM System

A customer relationship management (CRM) tool can be important for almost any kind of business. CRM systems help businesses in many industries to serve their customers more effectively.

In general, this kind of system is a mix of technology and customer-focused design that can offer assistance with various goals, such as decision support and better outreach. These kinds of systems are used by sales departments as well as other departments like marketing, tech support and call centres or other customer service departments.

**Here are some steps you should follow if you need to choose a CRM system.**

- Ask the right questions of vendors who are offering you their products. Getting key information about these kinds of systems up front can lead to a better final decision.
- Find out about operational details for the CRM systems. One important aspect of these systems is whether they are web-based, remotely hosted or otherwise sourced.
- Evaluate the functionality of the CRM systems. Make sure they will complement your existing IT infrastructure.
- Know how you will use this kind of resource to reach out to customers.
- Understand the most beneficial uses of these types of technology in your business. Look at call centres and existing facilities to see how various departments in your company can use CRM in the most effective way to reach out to customers.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### How To Choose A CRM System/Continued....

- Brainstorm with all levels of staff to figure out what features in a CRM system will be most useful and most effective.
- Try out the CRM system and make sure it works the way it should.
- Make sure the CRM system works with the data you have on hand.
- Analyse the database to make sure it can sync up with whatever you already are using to store client data. This is part of making sure that the specific CRM system you're considering works within your overall software architecture.
- Ensure that the CRM system works as promised.
- Make your final decision is according to best future management processes.
- Make sure that everyone is on board with the decision and that comparisons have been accurately and clearly made between CRM products.

Every day, the lead generator is told, “not now call me in three months”, every day, the sales person calling for that first magic appointment is told “not now call me in three months” and every day the sales person is told having made a great sales presentation, “not now call me in three months”.

And the very sad truth is they all they do the same thing, they diarise the call for three months and do nothing in between. What a crime!

**A good CRM system will enable you to keep in touch and improve your position with the prospect.**

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Success Story and Positive Mental Attitude

#### Henry Ford

Some businessmen create innovative products. Others create massive fortunes. Very few create an entire system of production, an entire industry, and one of the world's biggest companies, all within the same time period.

Henry Ford, one of the world's most important industrialists, is one of the few that have done such a thing, and his story remains one of the world's most inspiring and interesting.

Born in 1863 in a small township that's now part of Detroit, Michigan, Henry Ford's early life was spent on a small rural farm. With a farmer for a father and a housewife for a mother,

Ford's earliest years were spent surrounded by machinery. Impressed by farm equipment but uninterested in farm work as a career, he began training as a machinist in his late teens at a business in Detroit.

Ford was known as a talented repairman, having assembled and repaired watches during his early childhood years. His talents were soon put to the test as an engineer at the Edison Company, one of the city's pioneering mechanical corporations.

He invested heavily in the company's projects, and in his own too, eventually creating the Ford Quad-bicycle, an invention that would contribute heavily to his later engineering feats designing motorcars.

After a series of investments with the Dodge brothers – a family that would later go on to create its own automobiles – Ford created a racing car. With almost one hundred horsepower, it was one of the fastest vehicles of its generation, turning heads as well as dominating on the track.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Success Story and Positive Mental Attitude

#### Henry Ford/Continued....

**Seeing the potential of automobiles, Ford set out to create an inexpensive car for the American 'Everyman.'**

Seeing that the consumer-focused automobiles of his day were cumbersome and difficult to drive, Ford set out to create a car that anyone, given a few minutes of explanation, could control. One of his first creations, and one of his greatest successes, was the Model T. Inexpensive yet high quality, it was an immediate hit with the middle class of America, and sold in immense quantities.

To meet such high demand, and to stick with the model's low price point, Ford set out to create an innovative system of production. His production line system was an incredible development in its day, allowing Ford's workers to produce cars much more quickly than before.

**His company made more cars than all others combined, all the while paying its workers higher wages than competitors.**

Ford has, as any automotive enthusiast will know, gone on to become one of the world's biggest and most successful car manufacturers. Many of the innovations that Henry Ford developed are normal within the engineering world today, including the semi-automated production line and higher-than-normal wages for engineers. His contributions to engineering are immense and widely celebrated.

## Step 3

### Lead Generation Made Simple

#### The P.E.R.F.E.C.T Method - R - RECORD

#### Success Story and Positive Mental Attitude

#### Henry Ford/Continued....

*"If everyone is moving forward together, then success takes care of itself."*

- Henry Ford

Despite occasional criticisms due to his anti-Semitism and controversial 'social monitoring' tests for employees, Ford remains an icon of the industrial era and one of the business world's most valuable figures.

A hard-working, intelligent, and street smart visionary, his long-lasting success proves that a great vision can result in hundreds of years of results.

**DON'T FORGET TO WATCH THE "LEAD  
GENERATION MADE SIMPLE—RECORD"  
VIDEO.**