Multi-Touch Marketing Program

Processes, Procedures, Guidelines & Training Manual

Submitted to:

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Contents

Overview

The MetaOps, Inc. Multi-Touch Marketing Program is designed to be plugged in to any campaign or initiative for which the goals are to:

1. Profile and industry or industry sector/subsector to
   a. Identify opportunity
   b. Identify the market's areas of need/pain
   c. Build a targeted, precise and personal body of messaging from the profiling data
2. Further profile target companies within that sector/subsector to
   a. Identify their unique, individual challenges
   b. Create a list of key stakeholders/executive contacts
   c. Tighten up messaging for each company and contact
3. Create an industry sector-specific leads list
4. Create a leads conversion multi-touch marketing strategy
5. Create a leads conversion sales strategy triggered by multi-touch program response
6. Convert leads to clients

This system, when utilized properly and systematically, will:

- Be highly automatable
- Return optimal results with waste-free effort
- Exponentially increase the scope of quality leads
- Eliminate "push" marketing by creating two-way, dialogue-based marketing

Use this system whenever a market is identified for marketing and sales penetration (examples follow). The steps to implementing a successful multi-touch marketing program are:

1. Identify profile target
2. Complete sector/subsector profiling
3. Complete target messaging based on profile
4. Identify target companies within profiled sector
5. Profile target companies
6. Create executive decision makers leads list (include any and all forms of communication they use – direct to industry publications/sites to social media)
7. Set up the industry sector 7-Touch program based on sector profiling messaging
8. Set up a feedback loop system with all players and technologies so real-time data does not get lost and is leveraged to improve multi-touch system.
9. Initiate 7-touch program
10. Add feedback into the 7-touch program increasing it to 9-, 13- and even more touches if feedback indicates need for expansion

Follow the steps in the touch-flow diagrams to follow. Make adjustments as needed per suggestions in the diagram and customized in response to feedback.

Note, it is intended that this be a living document. As you use it and learn, incorporate your knowledge and improvements on an ongoing basis.

Touch Types

Following is a list of ways to reach out and touch a lead… It should be added to indefinitely as the programs develop and the creative juices flow

Did you know…?

- 80% of sales happen after the 5th contact with a potential customer
- Only 10% of prospective customers get followed-up more than 5 times
- 90% of companies stop following-up before most people are ready to buy

Assessment tool
Audio message
Autoresponder series
Blog
Blogtalk radio
Books (write, publish, sell, give away, strategic alliance)
Breakfast/Lunch/Dinner Meetings
Church
Client/Corporate Visit
Conference/Trade/Consumer show booth
Coupon/Voucher
Direct mail
e-mail
email invitation (to a demonstration)
Executive Assistant connectivity
e-zine
Gift: Send them a Book/Magazine Subscription
Gift: Send them a Music CD
Gift: When you have tickets to an event you cannot use - ask them if they would like them or if they know someone who can
Holiday party
Information exchange: Send competitive articles
In-person meetings
Introduction: former customer or colleague
Introduction: influential SME in an area of interest
Introduction: them to someone else who they do not know - who may be able to help them.
Letter: VITO letters (Very Important Top Officer)
Lumpy mail - hour glass, laser scope, trash can with money, yard stick
Media: trade publications
Media: TV advertising/content

Media: write magazine article, do interview, etc.
Membership: Associations/Affiliates
Membership: Clubs/Groups
Networking Online (i.e. ask them if there is anyone in your network they would like to know better - and then connect them, LinkedIn is great for this)
Networking: Kids activities/events
Networking: Messages of personal interest
Networking: Spouse to spouse communications
Networking: Trusted Advisor (Deliver a message through an "Inner circle" trusted advisor)
Newsletter
Personal card/note
Promotional offer of free stuff
Public speaking
Research: involve in
Research: share
Service club meeting(attend or give presentation)
Social Media (Twitter/Facebook)
Sponsor events
Telephone Call
Text/IM
Think Tank/Knowledge Exchange: Invite to attend a meeting about a common area of interest
Training (i.e. When you have an "extra" training seat - offer it to them)
Videos: YouTube
Voice Mail: 15 highly target voice mail benefit oriented
Web advertising – PPC, banners
Web meetings
Web page content
Webinar
Whitepapers

Touch-flow Diagram – For New Leads

This process is for cold leads and those that take a long time to convert. This diagram is based on if-then scenario modeling. It is not meant to be rigid in its if-then directions. It should be followed for process flow and effectiveness, but based on sector, companies and feedback, the "ifs" and "thens" are to be adjusted to respond to the demands of two-way marketing: conversation, feedback, relationship and confidence building.

TOUCH 1 -- FIRST CONTACT: When we first reach out to an executive, we want to invite them or members of their team to something extraordinary that's by invitation only. This event or relevant high-value giveaway must be of the highest quality.

EXAMPLES:

- Book a keynote speaker to do a live webinar (get permission to record/resell). Have an extended Q&A program for the speaker first, then for MetaOps execs after speaker has logged off.
- Send them a book that is autographed by the author(s) and arrange for them to have a virtual conversation with one of the authors (record/resell permission).
- Send them tickets and accommodation/dining vouchers for a MetaOps workshop or a conference at which MetaOps will present.

Response is YES

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Response is received, but OTHER

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Response is NO/NO RESPONSE

Handle the response in person to establish rapport and engagement. Make it as easy as possible for the respondent to get registered or receive their item. Add them to the warm leads list. Follow up with them to make sure they are attending or received item. Solicit their feedback about event/item. Go to Touch-flow Diagram for warm leads.

Handle the response in person to establish rapport and engagement. Assess how you can help the respondent. Make every effort to connect them with a sales rep or MetaOps, Inc. executive based on who can best assist them. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.

Adrian Wooldridge, Washington DC Bureau Chief, The Economist and Author, A Future Perfect: The Challenge and Promise of Globalization

TOUCH 2: Another offer is in order. In this case you can do a "sorry you couldn't make it to the X event we invited you to! But you are in luck because we recorded it, and you can watch it here [link]." At both the beginning and end of this webinar, give them a place to sign up, again by-invitation-only, to the next event. If the second offer is the book offer again but with a different value-added like a free 30-minute consultation with Ron Crabtree, send them some sample pages of the book or excerpts to get them interested. Here are some other options…

EXAMPLES:

- Invite them to an online meet and greet with the authors of the book. Ask them to review the table of contents and brief description of each chapter and then write up some questions they'd like to ask the authors. Have them submit these at the registration online so the authors can prepare.
- May be time to introduce the social media option (which will be a big part of the multi-touch) – Set up the Ask MetaExperts forum and invite them to join… the forum should be the searchable free level of Ask MetaExperts and part of the ME site.

Response is YES

Response is received, but OTHER

Response is NO/NO RESPONSE

You'll need to capture their information, so a short form will be the price of admission to the recorded webinar. Ask there if they want the opportunity to ask questions after; if so, enable live Q&A. Again, confirm time and attendance, get feedback after. If any direct contact is made, query them to see how you might assist further. If book or consultation offers are accepted, make these a very personal experience for them… Ask them to submit a short bio and introduce everyone at the beginning of the engagement. Make them a warm lead. Go to Touch-flow Diagram for warm leads.

Handle the response in person to establish rapport and engagement. Assess how you can help the respondent. Make every effort to connect them with a sales rep or MetaOps, Inc. executive based on who can best assist them. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.

http://www.drivingoperationalexcellence.com/press-release/

TOUCH 3: By Touch 3, you should have established a vestige of familiarity with your leads, now it's time to establish TRUST. The first two touches were designed to make your acquaintance in a non-threatening, friendly way. To turn leads into clients, however, they must trust that you are who you say you are, you have value to them, and if they listen to you and sign you on, you won't let them down. Time to give them a free tool they can use immediately that will make a difference. Note that this is where it become vital you did a good profiling job. In order to craft the tool, you MUST know what problems they face every day and give them relief from one.

EXAMPLES:

- If the industry is compiling intelligence to help it launch/improve an initiative – say in marketing – give them the results of a survey done by MetaOps for that industry.
- If they have a staffing shortage in an area, compile a team of MetaExperts to consult on the issue and develop a white paper to give them.
- Create a first steps to success on Twitter or similar social media guide and disseminate it free of charge. Have it for sale too – adds value.

Response is YES

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Response is received, but OTHER

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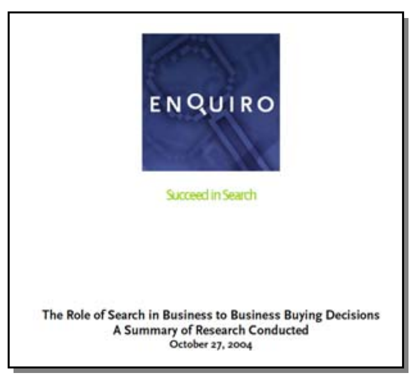
Response is NO/NO RESPONSE

In this case, you aren't inviting them to anything, so follow up the freebie with an email or call to see if it was useful. In that follow-up, let them know about other similar tools in development. Find out if they would like some of them as well (down the road) and ask them what tools they think they need – their feedback will help you develop even more targeted solutions for the industry sector. Make them a warm lead. Go to Touch-flow Diagram for warm leads.

Handle the response in person to establish rapport and engagement. Chances are, they are really ready to engage but just don't know what they need. Bring in a heavy hitter on this discussion if at all possible. The exec on the team with the most knowledge of their industry/pains… this could well be a conversion opportunity. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.



TOUCH 4: For Touch 4, there is no reason not to give them another useful tool, just make sure it is very different from whatever you sent them the first time. This will show the diversity of offerings with which MetaOps can assist them. At this point, also remind them that they can watch the original event (recorded) and list any of the tools you have given out on other campaigns that may be relevant. Invite them to ASK for the ones they want. This will help you learn more about where they think they need help and you can arm your sales team with this valuable knowledge.

Response is YES

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Response is received, but OTHER

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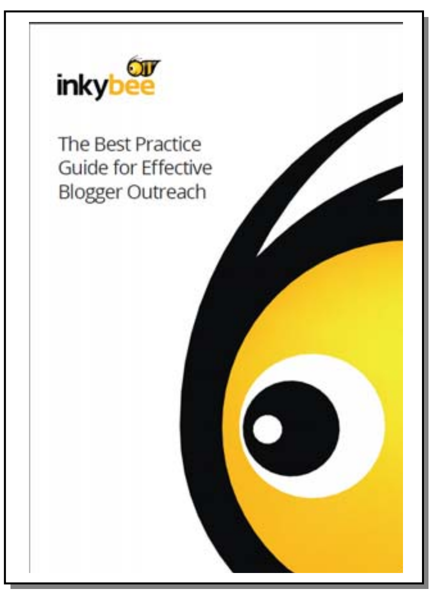
Response is NO/NO RESPONSE

Follow up the freebie with an email or call to see if it was useful. In that follow-up, ask if they want any others from the list. If they have already requested them, ask for a virtual meeting in which you can instruct them on their use and get to know their needs. Bring a heavy hitter to this meeting, first to observe, then to take over if the opportunity for develops. Make them a warm lead. Go to Touch-flow Diagram for warm leads.

Handle the response in person to establish rapport and engagement. Chances are, they are really ready to engage but just don't know what they need. Bring in a heavy hitter on this discussion if at all possible. The exec on the team with the most knowledge of their industry/pains… this could well be a conversion opportunity. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.



TOUCH 5: By Touch 5, you are well into their field of vision… they recognize you and know you mean to make a connection with them. Time to ask what THEY want, straight up without making any assumptions or giving them something. This is a time for transparency. Tell them flat out why you think they want to do business with you and that your intention is to win their business. Put their feet to the fire by telling them you won't go away until you've met to determine if there is viable relationship potential, or they tell you to get lost. This is a very personal contact. They know you, be their buddy – professionally but with charm, of course.

This is also a good time to introduce them to the human side of MetaOps. Make sure you have the social media presence well developed for this one so they can get past the corporate site and persona and into the company's circle of friends, customers, etc.

Note: The MetaOps social media presence really needs to be developed… who are we, what do we want the world to think about us, feel for us? How do we want them to feel as members of our personal inner circle…? Sites and tweets, etc. should be broken down by company sector, and there should be a MetaOps Club site as well…

Response is YES

Response is received, but OTHER

Response is NO/NO RESPONSE

Try to make a personal connection with them – phone, virtual meeting – and bring in a heavy hitter. If they are interested, they probably need help figuring out what they should be doing; this may be an excellent opportunity to set up a short-term partnership collaborating on a solution MetaOps can make free to them and sell to other companies in the sector. This engagement is all about long-term relationship building even if the lead is reluctant to buy still. Make them a warm lead. Go to Touch-flow Diagram for warm leads.

See above. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.

TOUCH 6: By Touch 6, if you haven't made some kind of meaningful connection – voice, meeting, exchange of emails – you need to figure out what the stops are and commit to pulling them all out! This really means that you need to make a direct connection and GET INTO THEIR HEADS. This is also the point at which some will just say stop bugging me.

This is an excellent time to roll out a One-Day Wonder or Five-Day SuccessWay. They clearly need some really tangible, relevant proof that MetaOps has what it takes to change their game.

Note, if they say stop bugging me, put them on the cold list, go to Touch-flow Diagram for cold leads.

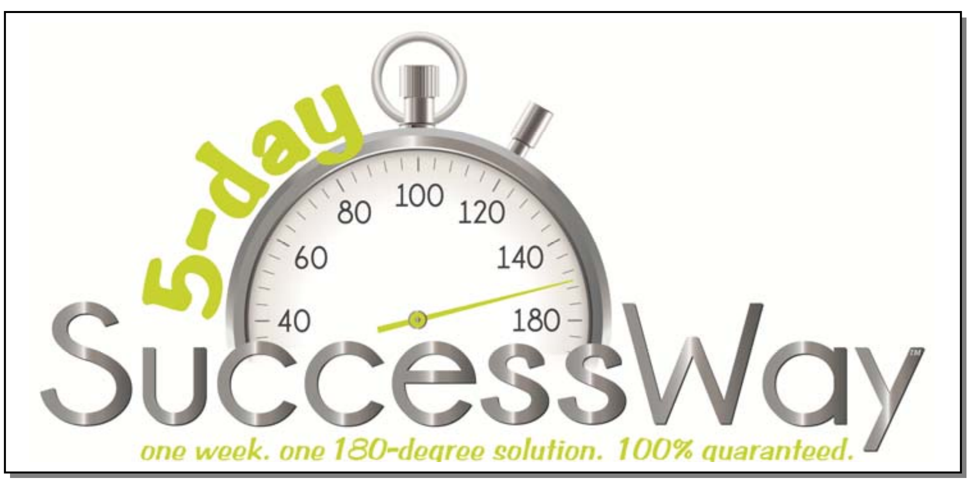
Response is YES

Response is received, but OTHER

Response is NO/NO RESPONSE

Set up the One-Day Wonder or Five-Day SuccessWay RIGHT AWAY! Pull out all the stops, get all hands on deck and rock their world! Make them a hot lead. Go to Touch-flow Diagram for hot leads.

Help them however you can… get a few good thinkers on a call with them and give them an hour-long free consultation. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.



TOUCH 7: By Touch 7, you need to entirely re-evaluate your messaging to the non-responsive leads. Time to do some research and see if you can unearth any new trends, circumstances, etc. that are preventing them from seeing what MetaOps has to offer as a value to them.

Take out the profile, dust it off, and follow it again to see if things have changed that you may be able to address directly and with a free solution.

Next, ask them if they would be willing to consult with YOU. Pay them to do so. Establish what their hourly rate would be if they were paid by their company hourly and offer them that to pick their brain.

In this process, ask them to both tell you what they really need as well as evaluate and give feedback to your multi-touch approach, the company websites, etc… whatever element are relevant to your attempts to build a relationship with them.

Response is YES

Response is received, but OTHER

Response is NO/NO RESPONSE

Pay them. Ask them for referrals to other you can consult with in the same way and add those people to your leads. Incorporate their feedback into your next strategy steps with the industry sector. Meet you're your marketing and sales people to discuss their feedback and strategize about it. Make them a warm lead. Go to Touch-flow Diagram for warm leads.

Help them however you can… get a few good thinkers on a call with them and give them an hour-long free consultation. Tell them what you've learned from other exec consults – solicit their input and use it for strategy. Convert them to a warm lead. Go to Touch-flow Diagram for warm leads.

TOUCH 8: Now you are in the yellow zone… Touches 8-9 are in the yellow zone because, at this point, you need to start thinking about whether these leads are ever going to respond or convert. Time to sign them up with a free three-month trial subscription to the MetaOps eZine. Maybe they'll see something in there that gets their attention… At the end of that trial, make sure to ask them if they want to subscribe – no more freebies then because if they don't subscribe they really are NOT interested in MetaOps.

Response is YES

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Response is received, but OTHER

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Response is NO/NO RESPONSE

Find out from them what finally got them interested. This feedback will be very valuable. Hook them up with your heaviest hitter right away! This lead is probably going to be a tough nut to crack and a high maintenance client that demands special attention. Make them a hot lead. Go to Touch-flow Diagram for hot leads.

See above. Have your heaviest hitter help them. Convert them to a hot lead. Go to Touch-flow Diagram for hot leads.

MetaOps MAGE-ZINE

MetaOps MAGAZINE

BUSINESS EXCELLENCE SOLUTIONS
for successful professionals

TOUCH 9: See Touch 1… Bring on an all-new and terrifically vibrant event and treat them like a VIP.

Response is YES

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Response is received, but OTHER

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Response is NO/NO RESPONSE

See Touch 1 and Touch 8. Make them a hot lead. Go to Touch-flow Diagram for hot leads.

See Touch 1 and Touch 8. Convert them to a hot lead. Go to Touch-flow Diagram for hot leads.

TOUCH 10: If Touches 8 or 9 didn't shake them loose, you're in the red zone… maintenance mode. At the end of the red zone, quit the lead, it will likely NEVER manifest.

For this touch you are going to simply ask them what they want you to do next. Then do that if they respond. Use what you have learned in the previous touch steps with other leads to connect with them personally about the process, lessons learned and make sure they know their response, whatever it is, is valuable and appreciated.

Response is YES/Other

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Response is NO

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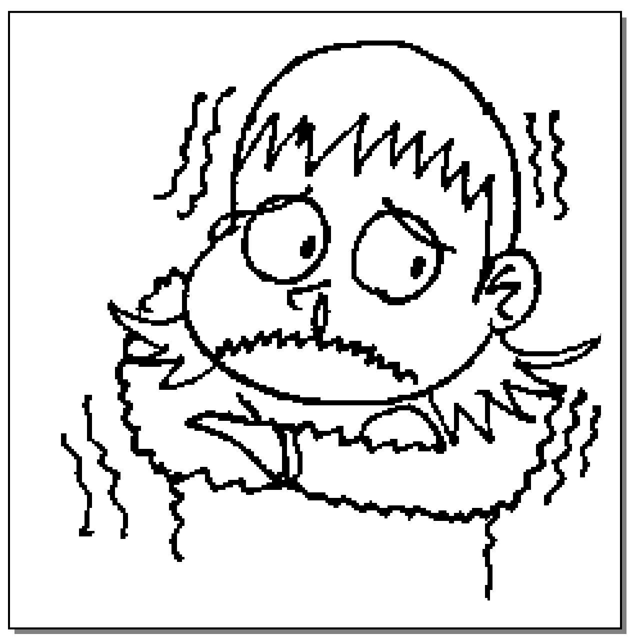
NO RESPONSE

Make them a hot priority and a hot lead. Go to Touch-flow Diagram for hot leads.

You are done. Convert them to a cold lead and give them a break for three months, then put them on the dead leads maintenance program if you still think there is any hope. Go to Touch-flow Diagram for dead leads.



TOUCH 11: LOAD them up with links to things they can read accompanied by a short (tweet sided) message explaining why the link is important to them.

Response is YES/Other

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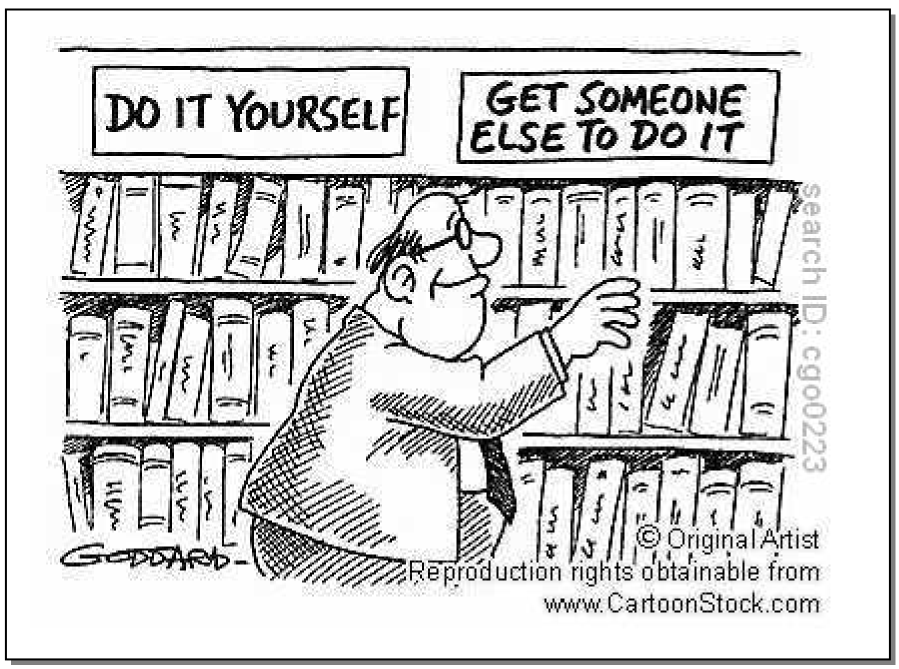
Response is NO

____

NO RESPONSE

Make them a hot priority and a hot lead. Go to Touch-flow Diagram for hot leads.

You are done. Convert them to a cold lead and give them a break for three months, then put them on the dead leads maintenance program if you still think there is any hope. Go to Touch-flow Diagram for dead leads.



TOUCH 12: LOAD them up with links to videos (training, webinars, etc.) accompanied by a short (tweet sided) message explaining why the link is important to them.

Response is YES/Other

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Response is NO

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Make them a hot priority and a hot lead. Go to Touch-flow Diagram for hot leads.

You are done. Convert them to a cold lead and give them a break for three months, then put them on the dead leads maintenance program if you still think there is any hope. Go to Touch-flow Diagram for dead leads.

Touch-flow Diagram – For Warm Leads

Once a lead is warmed up, meaning you have had some type of meaningful exchange with but they haven't committed to any sales contact, two things have to happen:

1. The personal relationship must be nurtured in a personal way (or many), and
2. The lead needs to be put on an indefinite touch program that keeps MetaOps top of mind for them and continues to poke helpfully at whatever has been identified as their challenge/pain.

When you create an ongoing touch program for warm leads, you need to keep a number of things in mind:

- Don't let the program overwhelm them or be too much of a good thing in addition to your personal contact.
- Make sure the program achieves two things in every touch:
  - Talks about something helpful to the lead that is precisely relevant to them, and
  - Builds up their impression of MetaOps (news, developments, new products, success stories, testimonials, etc.)
- Don't let the touch type or material get repetitive and boring… If you are bored with the touch program process, that will show through
- Automate the touch system, but keep the personal contact very untouch-like.

Here's an example of a warm leads touch flow – if, at any point the lead communicates anything that sounds like interest in working with MetaOps, bring in your heaviest hitter and meet with the lead – you, the closer and the lead – as immediately as possible (if they are sort of ambiguous try this approach anyway – a good closer should be able to bring them around). This one is every two weeks:

1. Personal email, call, skype thanking them for their interest and feeling out where they are in the process.
2. Current short/abbreviated press release about something MetaOps is doing that is relevant plus tip of the day designed for them.
3. Announcement/invite to relevant webinar plus a "Did You Know" blurb about something going on in the news in their industry.
4. Link to a relevant blog article plus and invite to set up a dashboard at MetaOps site, incentivized.
5. Copy of a couple relevant social media posts and invitation to join the social media inner circle if they haven't already plus a tip for maximizing their social media presence.
6. Etc., etc., etc.

Touch-flow Diagram – For Hot Leads

Hot leads are not to be treated like a lead. From the moment they become hot – have expressed an interest in doing business with MetaOps – they need to be connected with personally, by the heavy hitter that best suits their industry, personality, status, etc. This person needs to go as far out of their way to meet up with the hot lead as possible. It's all personal now: personal calls, emails, private meetings, dinner, whatever it takes. This stage seals their trust in MetaOps and begins their personal relationship build with one and then some of the MetaOps people.

By the time a lead becomes hot, in most cases, you should know quite a bit about them. Ideally, you will be introducing them to their primary contact within MetaOps. The introduction goes a little something like this: "Lead, I'd like to connect you with MO Person X. He/she has spent 15 years working in your industry, has come up with some really innovative solutions for such companies as (drop a few names), and has a wonderful sense of humor I think you'll enjoy."

↓

You should be on hand to make the introduction and then hand your lead off, letting them know you will always be there for5 them. After their initial meeting with their contact, connect with the lead to find out how it went and if there is anything else you can do for them. Put yourself in the role of facilitating their ongoing and productive connection with their primary contact.

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Once you are confident they are working regularly with their contact, it's time for some loyalty building. Do this by showing your appreciation for them by sending them something a little special every three weeks. This can be something like the red phone (ask Kim), tickets to show they might enjoy, gift card to a restaurant with a recommendation of something on the menu. These items are sometimes MetaOps branded and sometimes not. Remember, this really IS personal. The lead is already sold on MetaOps, now you are maintaining their faith, trust and loyalty and continuing to build a personal connection and commitment.

Touch-flow Diagram – For Dead Leads

Believe it or not, even dead leads need to be contacted periodically. In many cases, they became dead because they would have liked to work with you, but circumstances just didn't allow it. You've already invested a lot of time and money into getting them to know you, so don't just throw that investment in the trash!

As these leads went through the more personal 1 to 12-touch process and didn't make a convertible connection, there is no need to put a lot of effort into customizing information to them. Instead, send them periodic updates on MetaOps and its services and successes. Eventually, what MetaOps is doing and what they need may well dovetail. Keep this effort automated and low effort.

If the system is automated and you are sending them information that was developed for another important purpose, this ongoing effort has zero negative impact and may net a few customers over time. If you want to "goose" the group periodically, throw in some type of enticement to try and shake them loose, like an invite to a special event.

Sample Program: MetaExperts General

Multi-touch campaign Name: MetaExperts Introduction				
Target Audience: Cross industry sampling of execs (compiled from online research)				
Profiling Document Name(s): None – this is a test campaign				
Leads List Size (number of leads): 10,000				
Duration of Campaign (how many touches): 7 (to 12 if getting traction)				
Stated Goal(s) for Campaign: 2% return to hot leads/conversions				
Campaign and Reporting				
Touch #	Description	Send Date	Responses	Conversions
1	Via email/LinkedIn/snail mail as necessary; announce in press release in trade publications/applicable media: Invitation to live webinar with Adrian Woolridge: Win the War for Talent. This seminar will teach execs about the real challenges they face finding and retaining the best talent. After the session, there will be a Q&A with MetaOps/MetaExperts demonstrating how ME can solve their issues in this regard.	1/15/13		
2	Via email/LinkedIn/snail mail as necessary; announce in press release in trade publications/applicable media: Sorry you didn’t make it, but we recorded it and have a special one-on-one session with authors of OpEx book and MetaOps execs after. We’ll send you autographed copy.	2/1/13		
3	Via social media channels i.e. Twitter: Please join our MetaExperts inner circle on Facebook. This is where we’ll announce new talent, supply links to forums, blogs, etc…	2/15/13		
4	Via email/phone/LinkedIn/PR: We’ve been in contact with you a few times now, and we’d like your feedback. Can you join our executive team for a one-hour virtual round table where we’ll respond to your challenges with creative solutions – this is the feedback loop session that gives you hyper-current information for next steps.	3/1/13		
5	Offer up a One-day wonder… Use a generic	3/15/13		

	example of one, create PowerPoint and turn to video. Incentivize with a second one free if they refer you to someone else who signs up for one. For MetaExperts the 1DW needs to supply an ME consultant specializing in their need who will give them actionable tools they can DIY with.			
6	Meet a MetaExpert through Ask a MetaExpert program… Have a couple 8-hour time periods when a number of MEs are manning the phones (at no cost) and invitees can call in and ask questions. Make sure feedback loop process is well in place. Use some of the teasers you gained from touch 5 to publicize this event… i.e. “Ever wonder how you can solve problem X? Ask a MetaExpert! $500 value free these two days only!”	4/1/13		
7	Come to our Spring Conference!	4/15/13		

Multi-Touch Program Planning Template

Multi-touch campaign Name:				
Target Audience:				
Profiling Document Name(s):				
Leads List Size (number of leads):				
Duration of Campaign (how many touches):				
Stated Goal(s) for Campaign:				
Campaign and Reporting				
Touch #	Description	Send Date	Responses	Conversions