

# Insperity BPA

# Nurture Marketing Fundamentals

August 25, 2017

Interesting thing about you



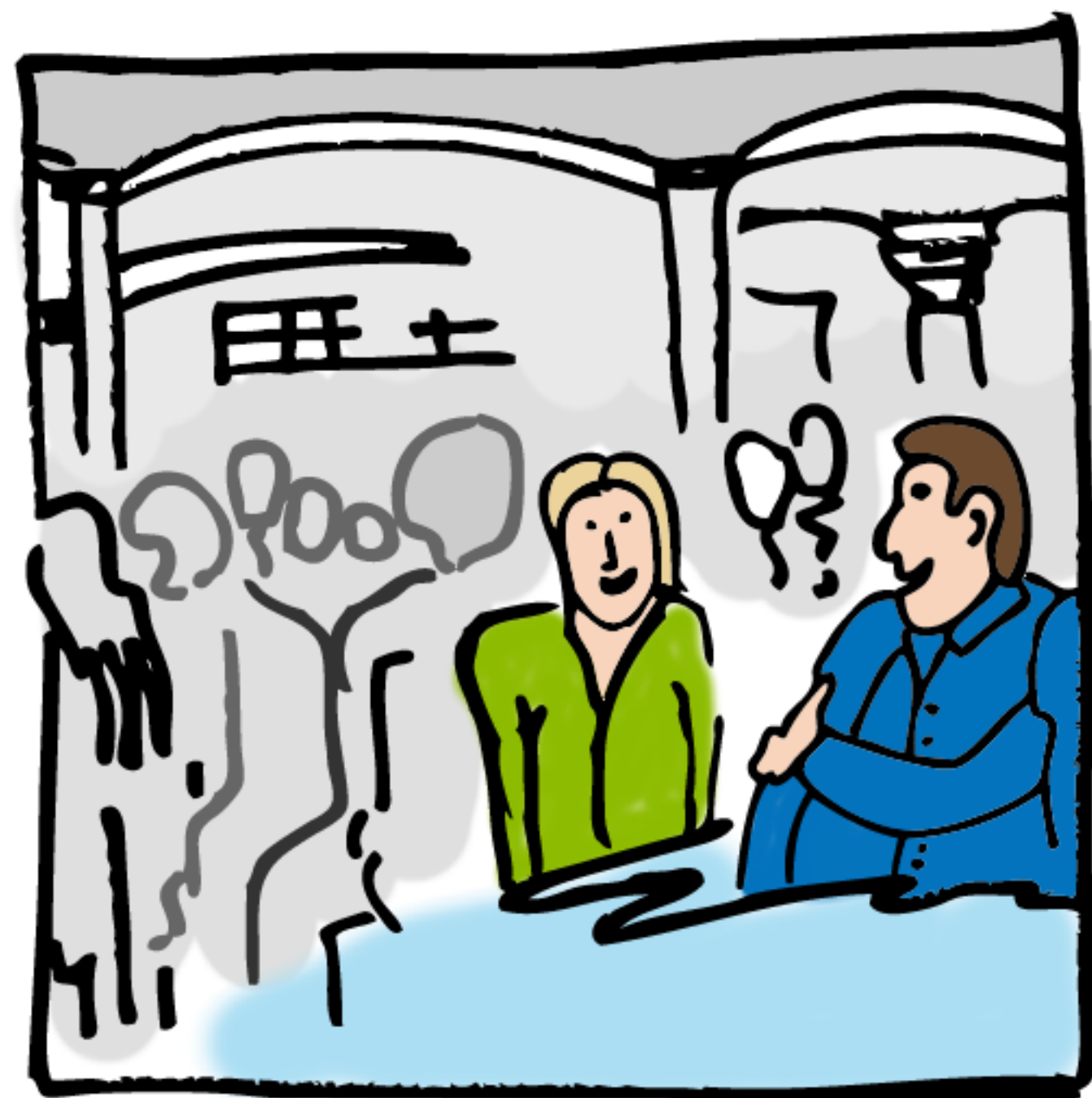




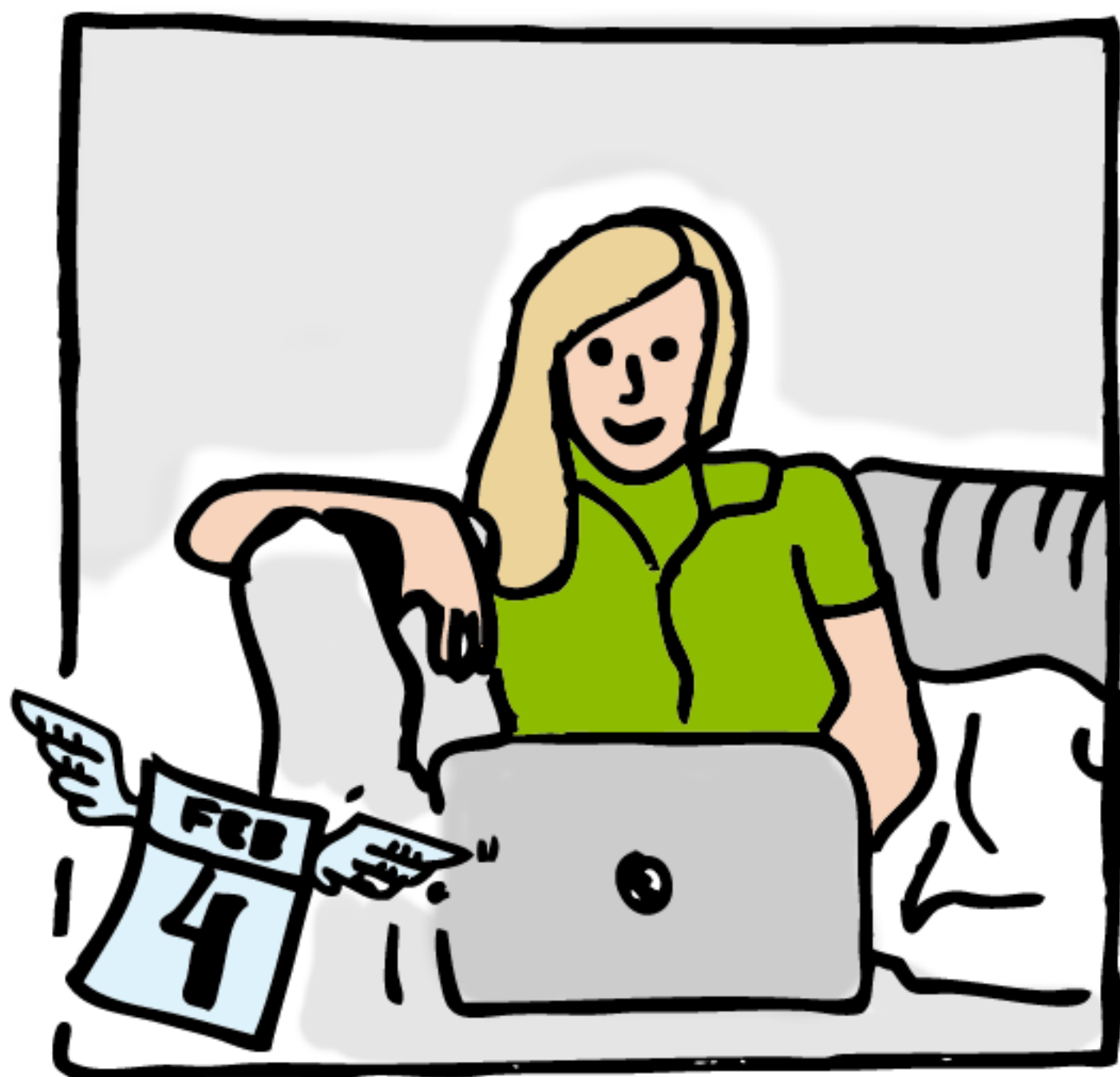
Interesting thing about you

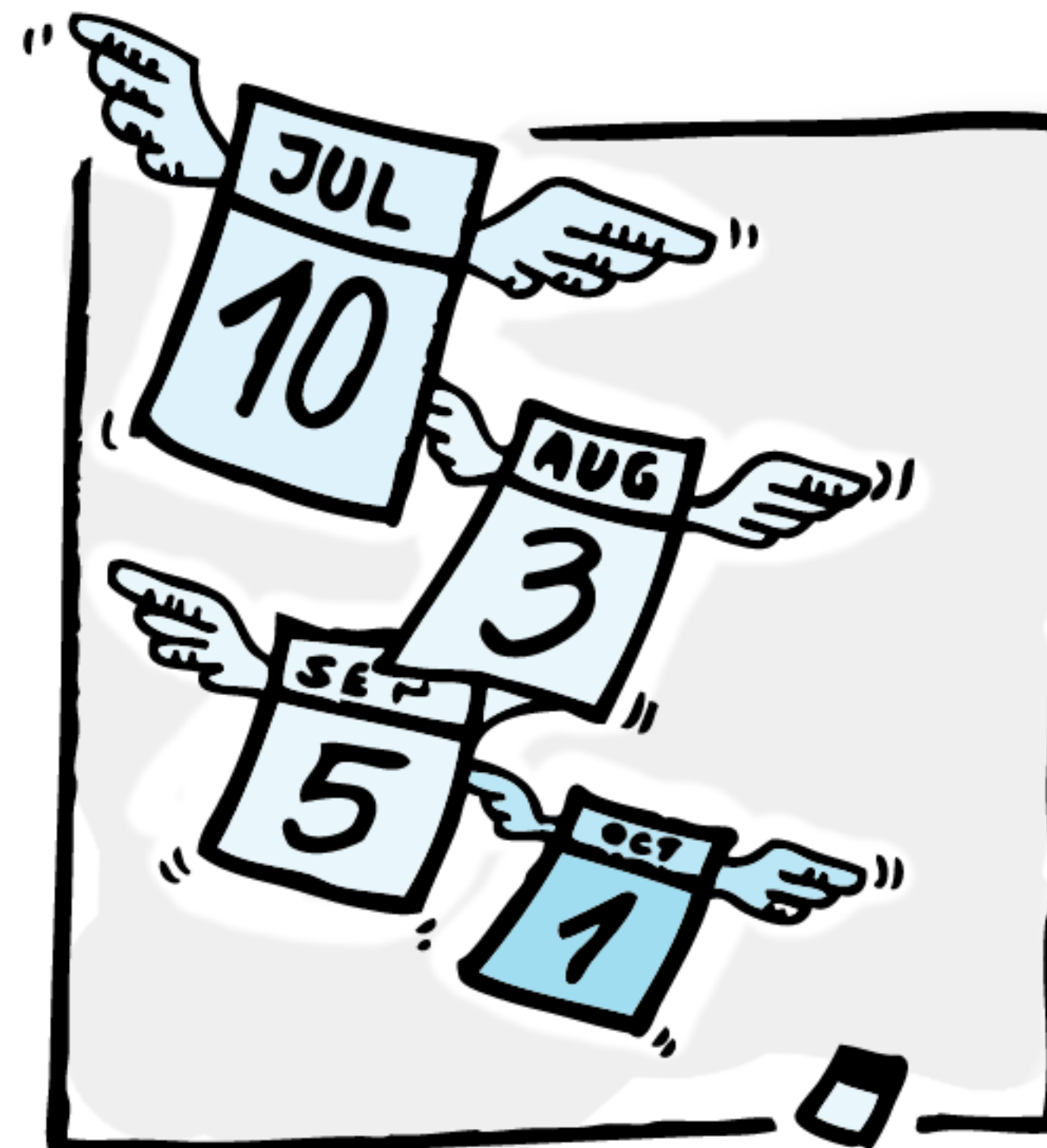
# Agenda

- Nurture Marketing Overview
- Copywriting Resources
- Tools
- Personalized Campaign Workshop



You meet Debra

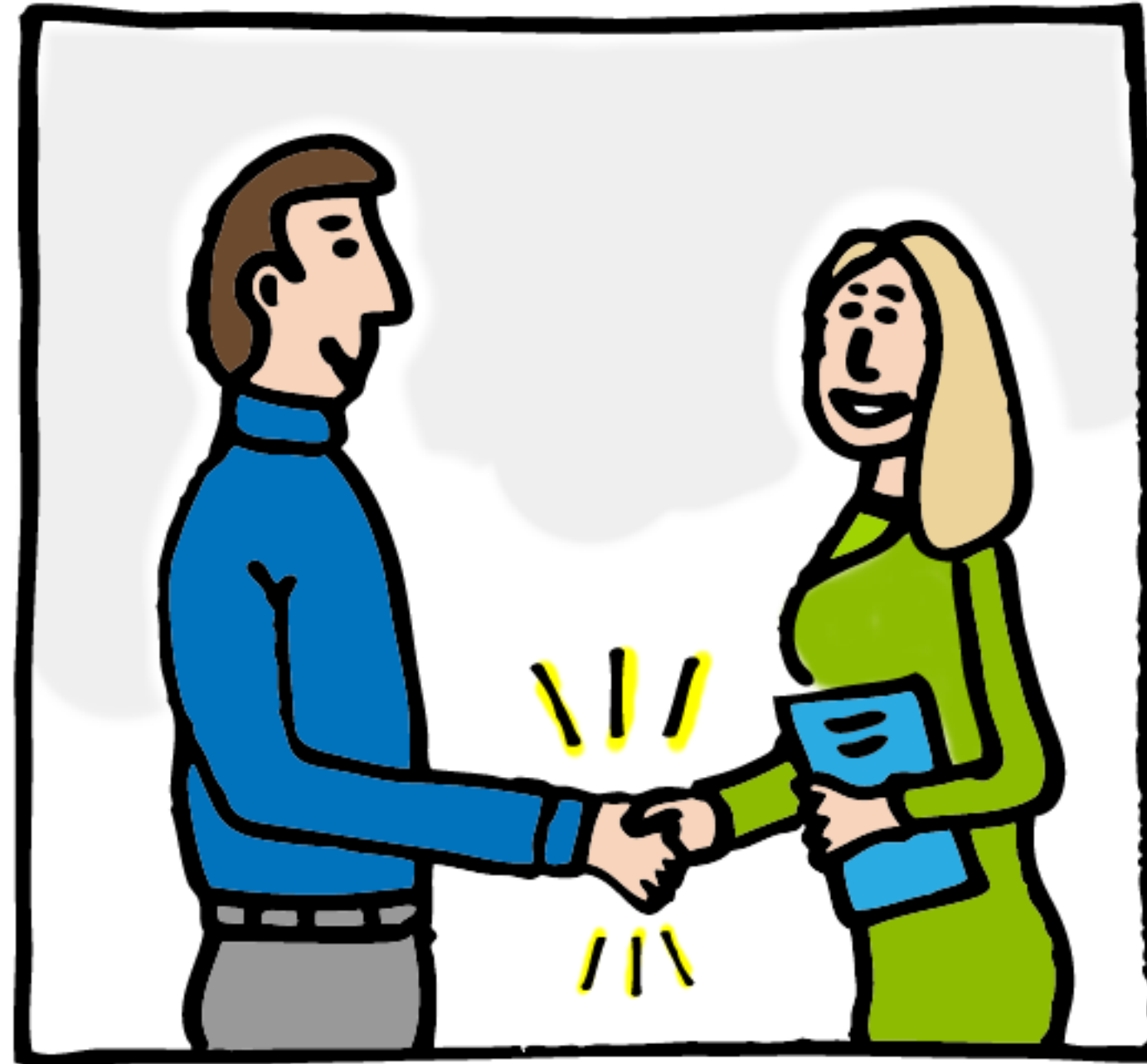


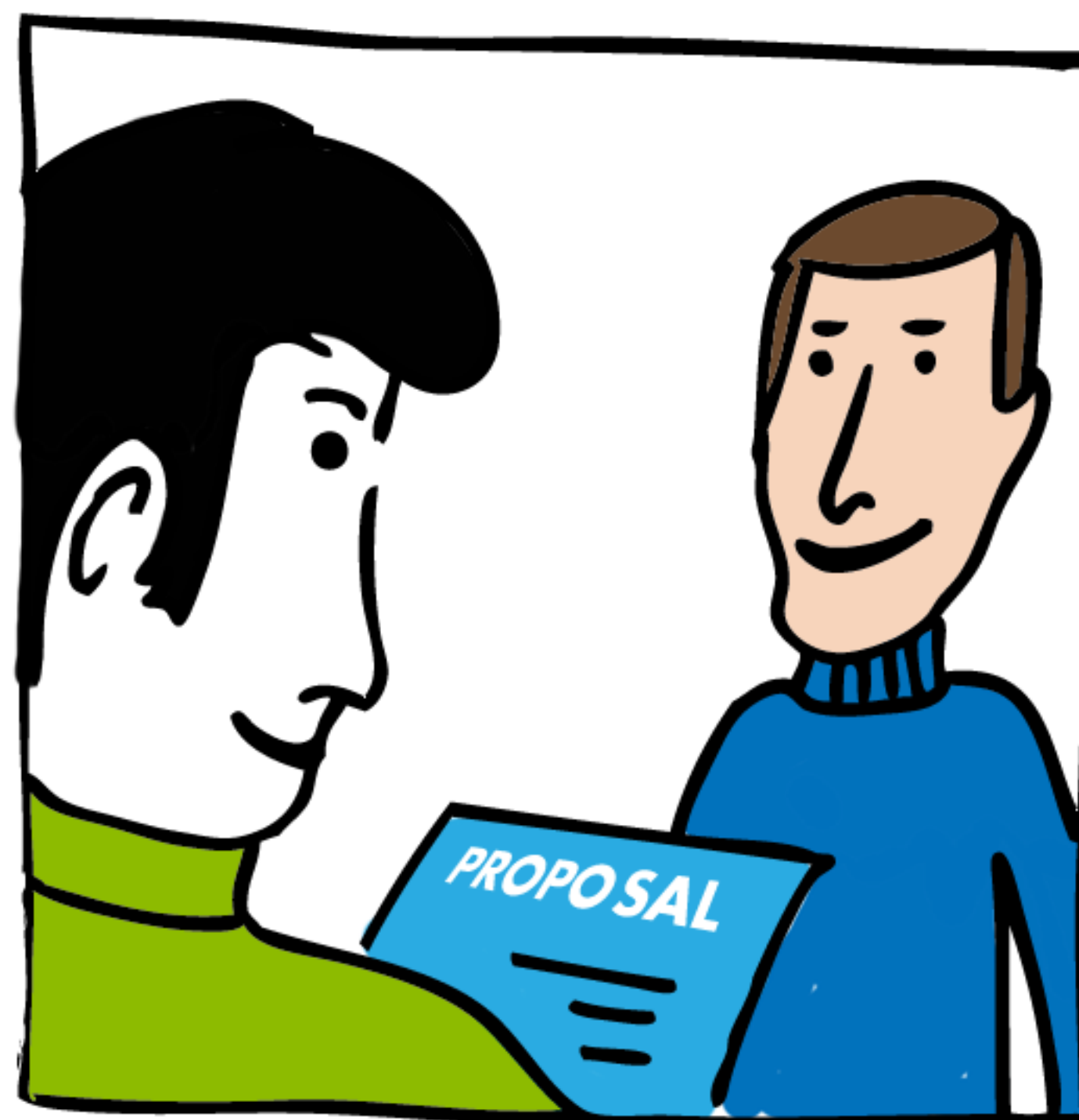






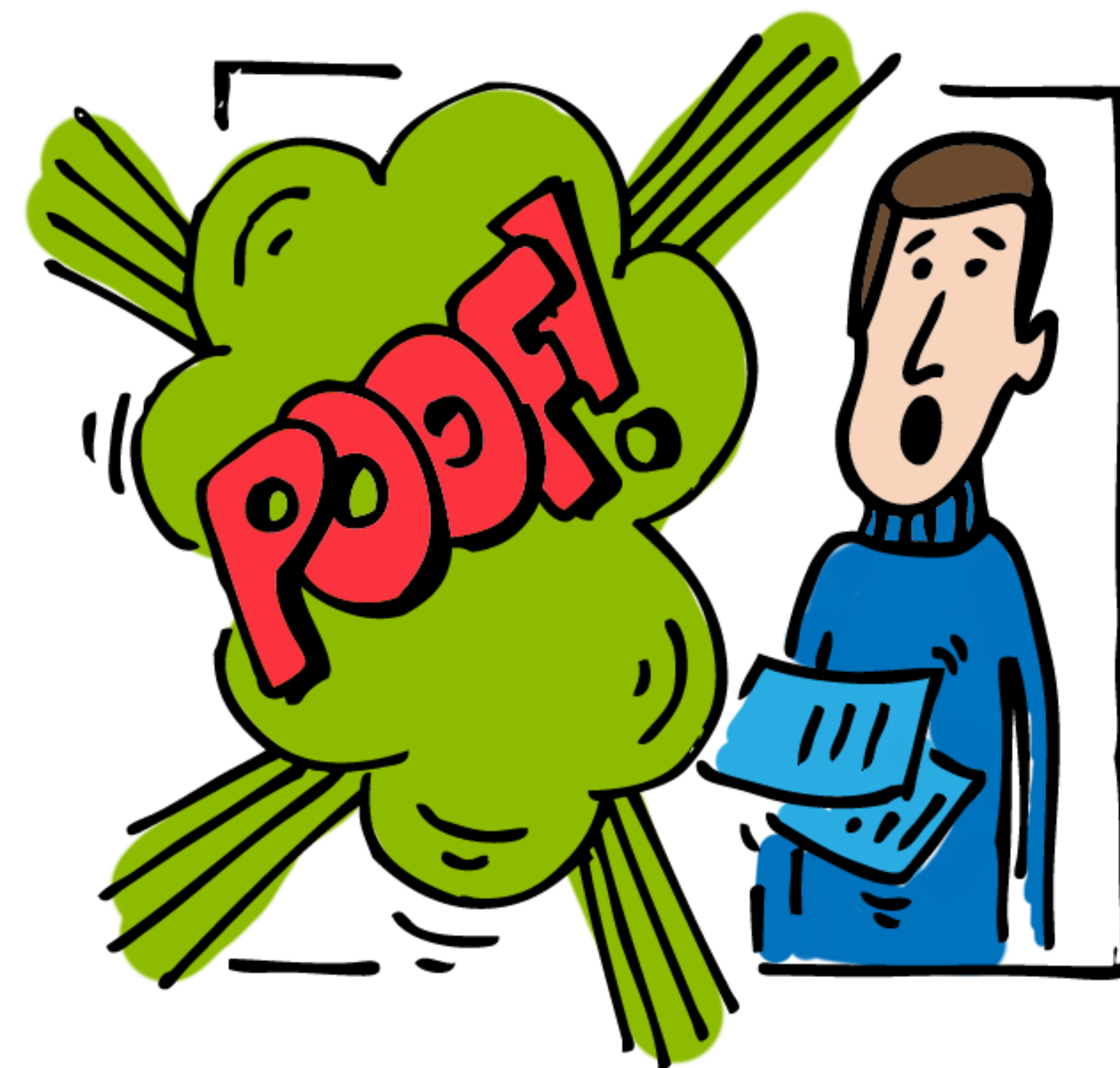
Picture the Call

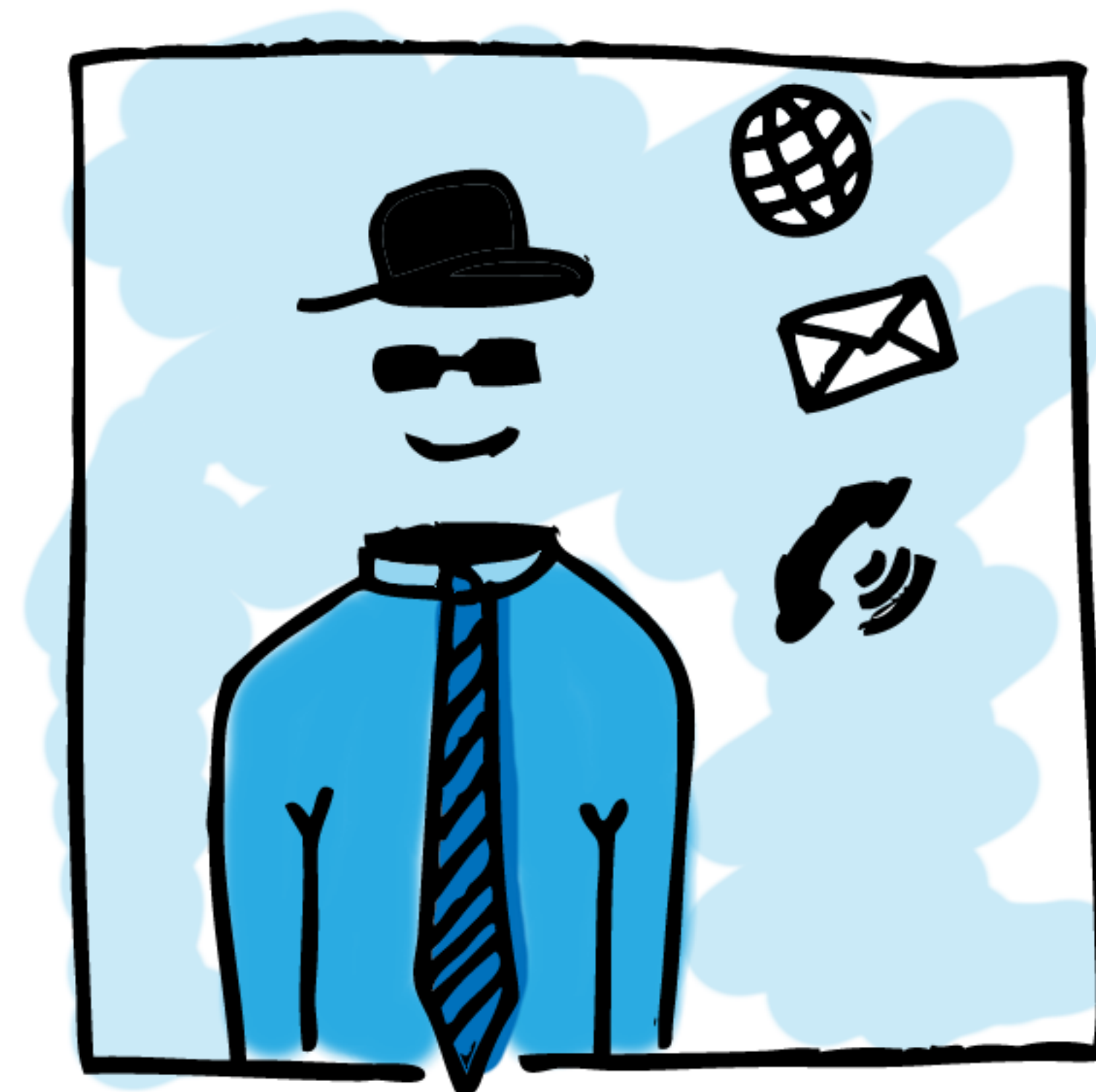




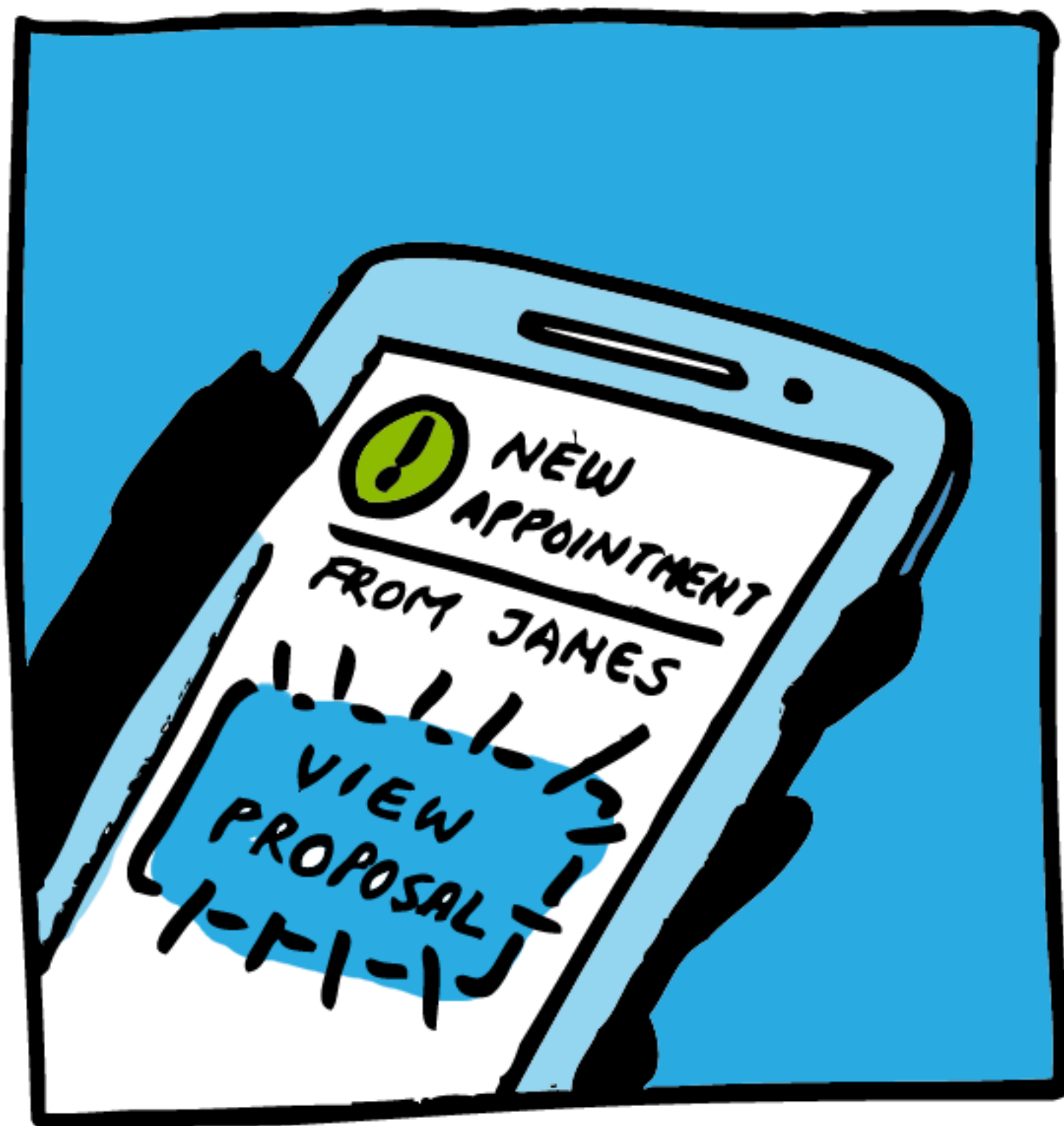
You present a proposal to James



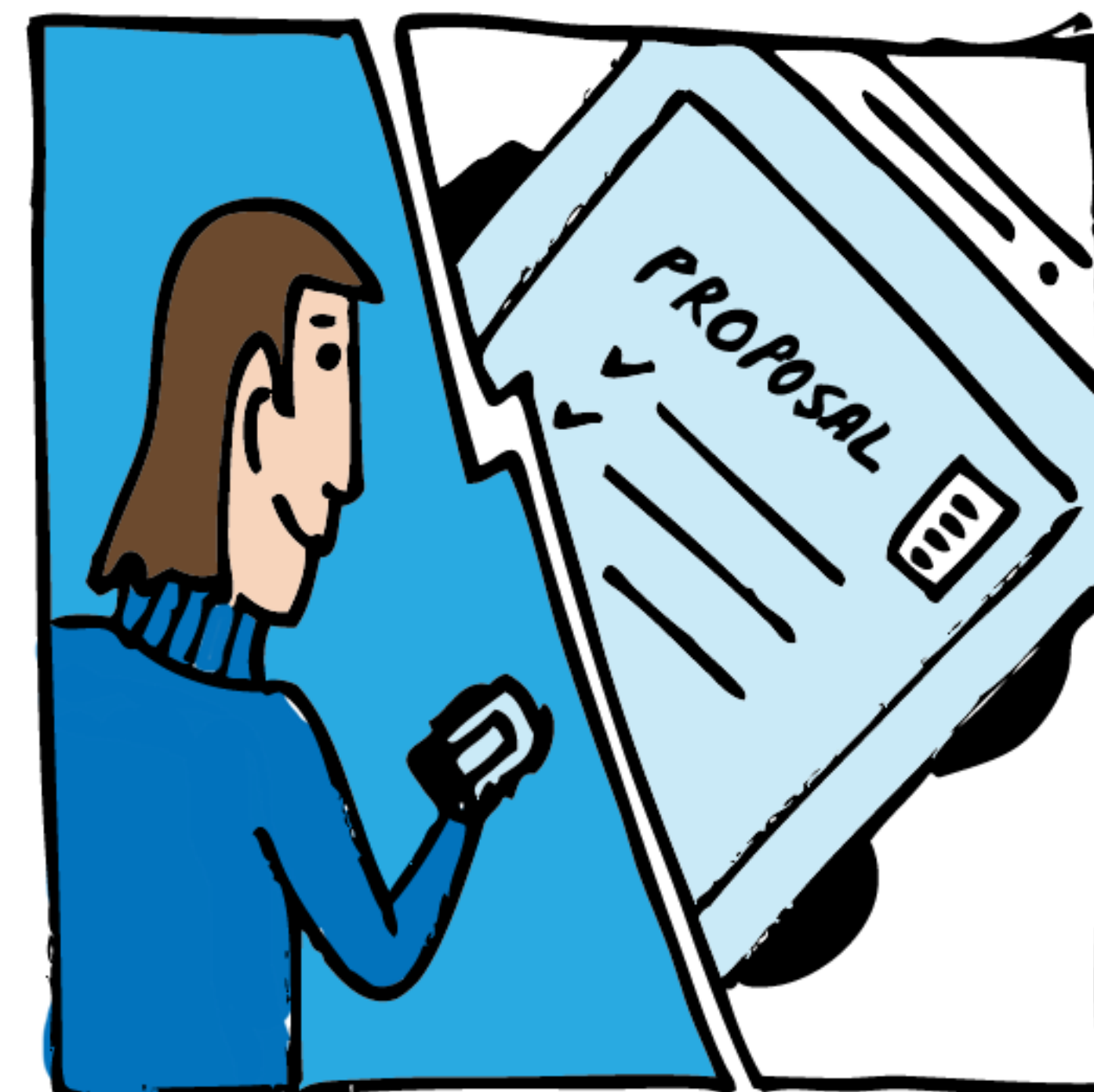




**THE INVISIBLE SALESPERSON...**



David Makes an Appointment



You Review the Proposal





**THE INVISIBLE SALESPERSON...**



Can you imagine the Invisible Salesperson?

**THE INVISIBLE SALESPERSON...**

So, How exactly do I do this?





**John Arnott**

CEO

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PHONE 800.550.5701  
EMAIL [jarnott@ContentFirst.Marketing](mailto:jarnott@ContentFirst.Marketing)  
BLOG <http://WhyIStartedABlog.com>  
WEB <http://ContentFirst.Marketing>



**ContentFirst**  
MARKETING

**Full Name** John Arnett  
**Company** Content First Marketing  
**Email Address** jarnott@ContentFirstMarketing  
**Phone Number** 800 550-5701



**John Arnott**

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BLOG <http://WhyIStartedABlog.com>  
WEB <http://ContentFirst.Marketing>



Send the “Nice to meet you” email

It was nice seeing you last night. - Message (HTML)

File Message Insert Options Format Text Review Tell me what you want to do

Send & Record Infusionsoft Address Book Paste Clipboard Basic Text Names Attach File Attach Item Signature Include Assign Policy Tags Office Add-ins Add-ins

To...

Cc...

Subject

Send

Hi John,

It was great meeting you at the Young Professionals Event. It sounds like we are working with the same target market. Let's grab a coffee some time. I would like to hear more about your business.

I keep my calendar online. Click the link below, find a day and time that works best for you and we can get it scheduled.

[Book a coffee with me](#)

Best Regards,

John Arnott  
CEO – ContentFirst.Marketing  
972.533.9779  
[Book a call with me](#)  
[Book a coffee with me](#)

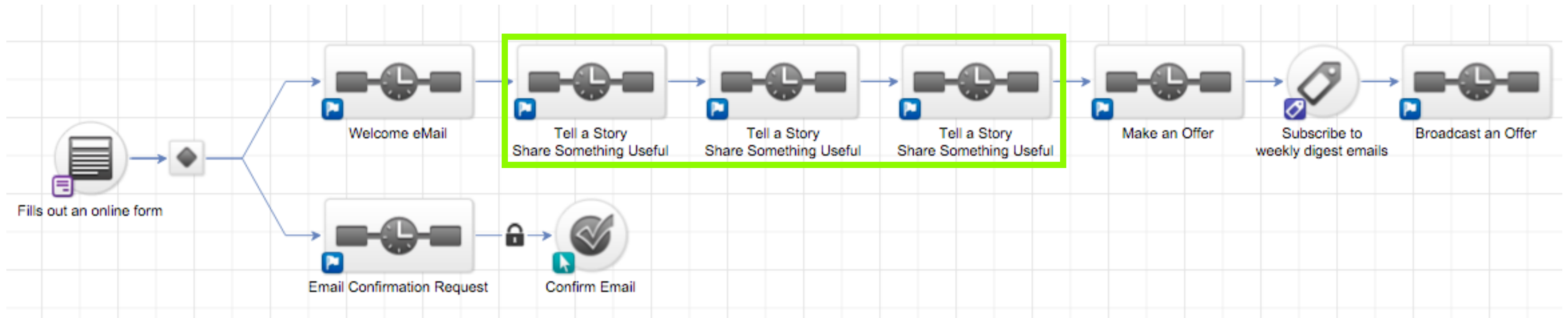
Author: [Content First Marketing](#)

Meet or have a call

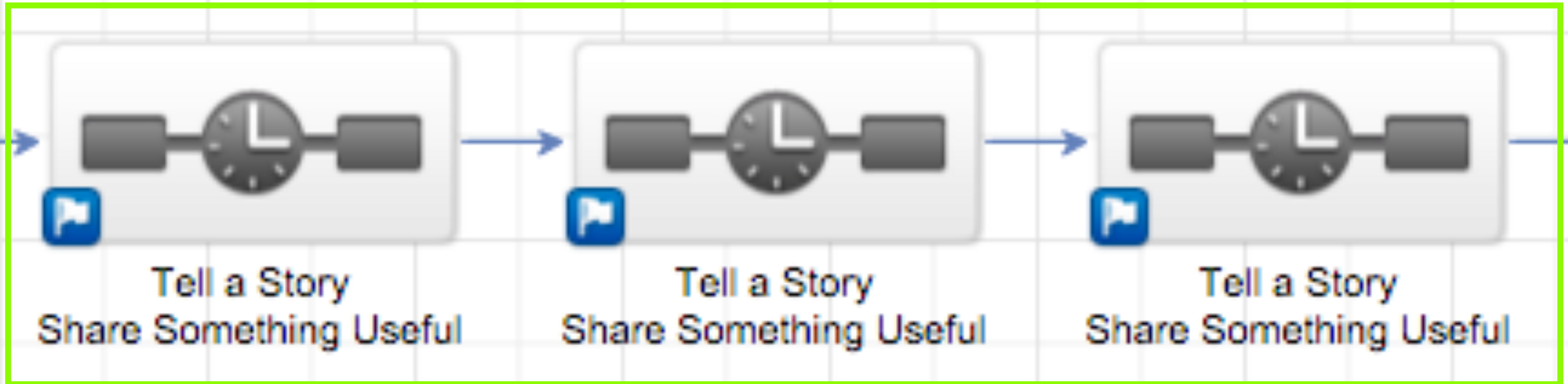


# Begin the Nurture Series

# eMail Nurture



# eMail Nurture



## eMail Nurture

**1**

Send the Nice To Meet You  
eMail

One Time

**2**

Send the Automated Series  
Scheduled with Delayed Sends

**3**

Add into Consistent Digest  
Broadcasts to Distribution List



# Copywriting Resources

- Autoresponder
- Blog (sign up for your company blog)

# 5 Steps to Profitability

- 5 Steps to Profitability - #1 Strategy
- 5 Steps to Profitability - #2 Talent Management
- 5 Steps to Profitability - #3 Goal Setting
- 5 Steps to Profitability - #4 Winners Keep Score
- 5 Steps to Profitability - #5 Rewards and Recognition

# 5 Steps to Profitability - #1 Strategy

Dear John,

How do you create a compelling plan for the future that your employees will rally around? Your mission, vision and values are three things you can't do without in your company strategy.

Without direction, there's a lot of noise that can keep your employees – and ultimately, your company – from getting ahead.

- 1 Your mission is your company's purpose. It's why you do what you do. It should stand the test of time.
- 2 Your vision statement is how to accomplish the mission. It is measurable.
- 3 Concrete cultural values define behavioral expectations. They explain how the company expects the individual employee to work.

Find out more in this valuable blog – [How to Connect Employees with Your Company's Mission](#).

I will contact you soon to discuss how I have helped my clients with these critical elements of a company's organizational strategy as the first step to profitability.

Sincerely,

Sid Blache

<http://www.insperity.com/bpa/sid.blache>

# 5 Steps to Profitability - #2 Talent Management

Dear John,

“Talent management deserves as much focus as financial capital management in corporations.” – Jack Welch

“You don’t build a business. You build people and people build the business.” – Zig Ziglar

No one understands the importance of talent to an organization better than a business owner, right? The truth is, many business owners are stretched thin by the unrelenting demands of running the business and don’t have time to focus on the talent of their organization.

Are you in that same boat?

Enjoy this e-book resource – [From Hire to Retire: A Guide to Retaining Your Best Employees](#). I have helped many of my clients with strategies that keep their employees loyal and productive. I will reach out to you soon to set up a time to talk more about this important area of focus that drives profitability.

Best,

Sid Blache

<http://www.insperity.com/bpa/sid.blache>

Insperity

13737 Noel Rd., Suite 1250

Dallas, TX 75240

Business Phone: 214-622-4942



# 5 Steps to Profitability - #3 Goal Setting

Dear John,

“You can’t hit a target you cannot see, and you cannot see a target you do not have.” – Zig Ziglar

Passionate people are driven by a cause, a purpose and a belief.

Employees want to see how their work contributes to larger corporate objectives, and setting the right targets makes this connection explicit for them, and for you.

Effective leaders keep the emphasis on why the goal makes a difference to the company as a whole. Leaders who start with the “why” inspire those around them to take action.

Find out how with this valuable blog – [Top 7 Strategies for Helping Your Employees Reach Their Goals](#). When you inspire your employees to reach their goals and provide them with a fine-tuned strategy for success, your business will thrive.

My clients have experienced great success by aligning employee goals with their corporate strategy. I will contact you soon to discuss this important step for increasing profitability.

All the best,

Sid Blache

<http://www.insperity.com/bpa/sid.blache>

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Business Phone: 214-622-4942

# 5 Steps to Profitability - #4 Winners Keep Score

Dear John,

“What you can measure, you can manage.” – Peter Drucker

Monitoring the drivers of your business is the key to productivity and profitability. If you can track key performance indicators (KPIs) for sales, marketing, people, cash and finance, you’ll get a window into the health of the business. Producing KPIs with trend lines for all departments provides financial intelligence that enables better strategic decision-making.

What are you tracking?

Read [Keeping Score – KPIs That Drive Performance & Profitability](#) which reviews six essential drivers to help a business owner understand how people drive profitability.

I will contact you soon to talk more about this valuable tool.

Sincerely,

Sid Blache

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# 5 Steps to Profitability - #5 Rewards and Recognition

Dear John,

Everyone needs to be recognized as an individual or member of a group and to feel a sense of achievement for work well done.

Rewards and recognition are essential to a great workplace culture and help promote discretionary effort – the level of effort an employee gives above and beyond the minimum required.

This Insperity blog entitled [52 Epic Ways to Reward Your Employees](#) gives you plenty of ideas for positive reinforcement for everyone in your organization, showing them the kind of work you value most.

I will contact you soon to discuss how you can impact discretionary effort to drive profitability.

All the best,

Sid Blache

<http://www.insperity.com/bpa/sid.blache>

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# Personal Campaign Workshop

- Goal: Create Nice To Meet You, Nurture Series and Contact Group for first Broadcast
  - Personal eMail Templates
  - eMail Scheduling



# Tools

- Outlook
- OneSource

# Use Outlook Templates

- Outlook
  - Open an email you plan to reuse
  - Save as template
  - Edit each template / personalize
- Each time a blog arrives that you like, create a template to share it. Share immediately with your list. Then for new contacts schedule it to go out.

# Outlook Templates

The screenshot shows the Microsoft Outlook interface. The top ribbon includes 'File', 'Home', 'Send / Receive', 'Folder', 'View', 'Developer', 'Add-ins', and 'Tell me what you want to do'. The left sidebar shows a list of folders, with 'Insperty' selected. The main pane displays an email from Sid Blache (sid.blache@insperity.com) dated Tue 7/25/2017 8:02 AM. The email subject is '5 Steps to Profitability - #3 Goal Setting' and is addressed to John M. Arnott, II. The email body contains a quote by Zig Ziglar and discusses the importance of goal setting for employees. A 'Draft' email from Sid Blache is also visible in the list. The bottom status bar shows 'Items: 43', 'All folders are up to date', and 'Connected to: Microsoft Exchange'.

File Home Send / Receive Folder View Developer Add-ins Tell me what you want to do

Visual Basic Macro Security COM Add-Ins Disabled Items Choose Form Design a Form Code Add-ins Custom Forms

Drag Your Favorite Folders Here

CrimsonTechPart... 1  
Cultris 4  
Dr Lubbe  
EbenezerFoundation  
Edita  
EIG 1  
emyth  
Erin Botsford 9  
FromWhat2Why  
Guitar\_Music\_Jazz\_B...  
HATS 3  
HSRA 5  
Hyder  
Infusionsoft 4  
**Insperty**  
IUG  
Janet White 8  
JD Tech Sales 25  
Joel Scrivner  
Julie Chance 3  
KillTrip  
LaMont  
lubbe

Search Insperty Current Folder

Insperty All

John M. Arnott, II  
Re: BPA training plan 7/31/2017  
Thanks, Bill. Joe and Sid are scheduled for

askus@appointmentcore.com  
sid blache has just scheduled event with you... 7/31/2017

Joe Ellis  
RE: Event Info: Preliminary BPA Interview 7/31/2017  
All set today for 2:00 PM. Are we meeting

askus@appointmentcore.com  
Joe Ellis has just scheduled event with you o... 7/31/2017

Bill Brown  
RE: BPA training plan 7/31/2017  
John, Good plan. I will emphasize to my

Three Weeks Ago

[Draft] Sid Blache  
Park City Club Event on Aug 2nd 7/25/2017  
I think this event is on your anniversary but

noreply@infusionsoft.com  
Online Shopping Cart Order Shopping Cart 7/25/2017

Sid Blache  
5 Steps to Profitability #3 Goal Setting 7/25/2017  
Dear John, "You can't hit a target you

Last Month

noreply@infusionsoft.com  
Online Shopping Cart Order Shopping Cart 7/21/2017

SB Tue 7/25/2017 8:02 AM  
Sid Blache <sid.blache@insperity.com>  
5 Steps to Profitability - #3 Goal Setting  
To: John M. Arnott, II  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear John,

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Passionate people are driven by a cause, a purpose and a belief.

Employees want to see how their work contributes to larger corporate objectives, and setting the right targets makes this connection explicit for them, and for you.

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Find out how with this valuable blog – [Top 7 Strategies for Helping Your Employees Reach Their Goals](#). When you inspire your employees to reach their goals and provide them with a fine-tuned strategy for success, your business will thrive.

My clients have experienced great success by aligning employee goals with their corporate strategy. I will contact you soon to discuss this important step for increasing profitability.

All the best

Infusionsoft  
Oops! Som  
You are not currently logged in to Infusions...  
Log in to Infusionsoft  
Choose one of the foll  
Click to resu  
Click to turn

Help  
If you do not wis...  
Go to Settings  
Get additional help

Items: 43 All folders are up to date Connected to: Microsoft Exchange 100%

Search the web and Windows 11:41 AM 8/19/2017

# Let's Create Templates

- Download the Samples
  - <https://contentfirst.marketing/insperity-templates>
  - Unzip into \\Users\<YOU>\AppData\Roaming\Microsoft\Templates
- Nice to Meet You Template
- 5 Informative, educational, entertaining emails from Insperity



# Autoresponder

Schedule 5-7 emails to go out consistently over time with varied topics

# Autoresponder eMails

The screenshot displays the Microsoft Outlook 'Contacts' application window. The title bar reads 'Contacts - jamott@clearagainmedia.com - Outlook'. The ribbon includes 'File', 'Home', 'Send / Receive', 'Folder', 'View', 'Developer', and 'Add-ins'. The 'Home' ribbon is active, showing options for 'New Contact', 'New Group', 'Delete', 'Meeting', 'More', 'People', 'Business C...', 'Card', 'Move', 'Mail Merge', 'Forward Contact', 'Share Contacts', 'Open Shared Contacts', 'Categorize', 'Follow Up', 'Private', 'New Group', 'Browse Groups', 'Search People', and 'Address Book'. The left pane shows 'My Contacts' with a search box containing 'jamott@wavetwo' and a list of contacts: American Express, John Arnott Sr. II (selected), and GoDaddy. The main pane displays the contact profile for John Arnott Sr. II, including a profile picture with initials 'JA', a status 'Free for next 8 hours', and various contact details such as email addresses, phone numbers, and addresses. The bottom status bar indicates 'Items: 3', 'All folders are up to date', and 'Connected to: Microsoft Exchange'. The Windows taskbar at the bottom shows the time as 11:51 AM on 8/20/2017.

# Let's Schedule the Autoresponder

- Schedule 5-7 emails to go out consistently over time with varied topics
- Feel free to use [jarnott@ContentFirst.Marketing](mailto:jarnott@ContentFirst.Marketing) as your test if you wish

# Broadcast Emails

- Use the Outlook contact group - Prospects
- Create a recurring calendar appointment to find and schedule your broadcast



# Broadcast Emails

The screenshot shows the Microsoft Outlook interface. The ribbon at the top includes 'File', 'Home', 'Send / Receive', 'Folder', 'View', 'Developer', 'Add-ins', and 'Tell me what you want to do'. The left sidebar shows a list of folders and contacts, with 'Insperty' selected. The main pane displays an email from Sid Blache (sid.blache@insperty.com) dated Tue 7/11/2017 8:00 AM. The email subject is '5 Steps to Profitability - #1 Strategy'. The body of the email contains a list of three steps for creating a compelling plan for the future. A notification on the right side of the screen indicates a login issue with Infusionsoft.

insperty - jamott@clearagainmedia.com - Outlook

File Home Send / Receive Folder View Developer Add-ins Tell me what you want to do

New Email New Items Delete Archive Reply Reply All Forward Record E-mail Infusionsoft Go to Person Add Person HATS To Manager Move Rules OneNote Assign Policy Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Store

Drag Your Favorite Folders Here

Insperty

- IUG
- Janet White 8
- JD Tech Sales 25
- Joel Scrivner
- Julie Chance 3
- KillTrip
- LaMont
- lubbe
- Mary Handel 2
- MichellePrince 7
- Mikes Air 1
- PeggyGaines 8
- ProDrivers
- PROSPECTING
- Recipes
- Renew Sleep 4
- Rogohub 2
- Sales Pipeline
- Sanjay Jain
- Scott Hamilton
- SheilaSteinmark 5
- SimpleSleep 380
- SM Works 1

Search Insperty Current Folder

Insperty All

Today

- Sid Blache  
RF: Questions  
See below  
11:48 AM
- Insperty  
Response Required: Confirm Your Insperty B...  
If you are having trouble reading this email,  
10:28 AM
- Insperty  
Here is your e-book, John  
If you are having trouble reading this email,  
10:27 AM

Yesterday

- Insperty  
Tips and tricks for identifying and avoiding g...  
Fri 5:00 PM

Thursday

- Shay Hatter  
RL: Lead Nuture Campaign Training  
John: I wanted to confirm the time for Friday  
Thu 2:48 PM

Monday

- Shay Hatter  
RF: Conference Room  
I think it's at 7am. I'll let you know if it's  
Mon 8:45 PM
- Jason Schultz  
RE: Meeting today  
Hi John, Thanks for the cookies, kids.  
Mon 10:11 AM

Last Week

- Drewann Pearce  
RF: BPA training plan  
Hi John... Thanks for sharing this with me as  
Wed 8/9

Tue 7/11/2017 8:00 AM

SB Sid Blache <sid.blache@insperty.com>

5 Steps to Profitability - #1 Strategy

To: John M. Annett, II

This message has been replied to or forwarded.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear John,

How do you create a compelling plan for the future that your employees will rally around? Your mission, vision and values are three things you can't do without in your company strategy.

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Find out more in this valuable blog – [How to Connect Employees with Your Company's Mission.](#)

I will contact you soon to discuss how I have helped my clients with these critical elements of a company's organizational strategy as the first step to profitability.

Infusionsoft

Oops! Som

You are not currently logged in to Infusions...

Log in to Infusionsoft

Choose one of the foll

- Click to resu
- Click to turn

Help

If you do not wis...

- Go to Settings
- Get additional help

Items: 44 All folders are up to date Connected to: Microsoft Exchange 100%

Search the web and Windows 12:34 PM 8/19/2017

# Let's schedule a Broadcast

- Use the Outlook contact group - Prospects
- Create a recurring calendar appointment to find and schedule your broadcast

## eMail Nurture

**1**

Send the Nice To Meet You  
eMail

One Time

**2**

Send the Automated Series  
Scheduled with Delayed Sends

**3**

Add into Consistent Digest  
Broadcasts to Distribution List

**Do the first two (NTMY and Automated Series) in one sitting**

# Capturing Contacts

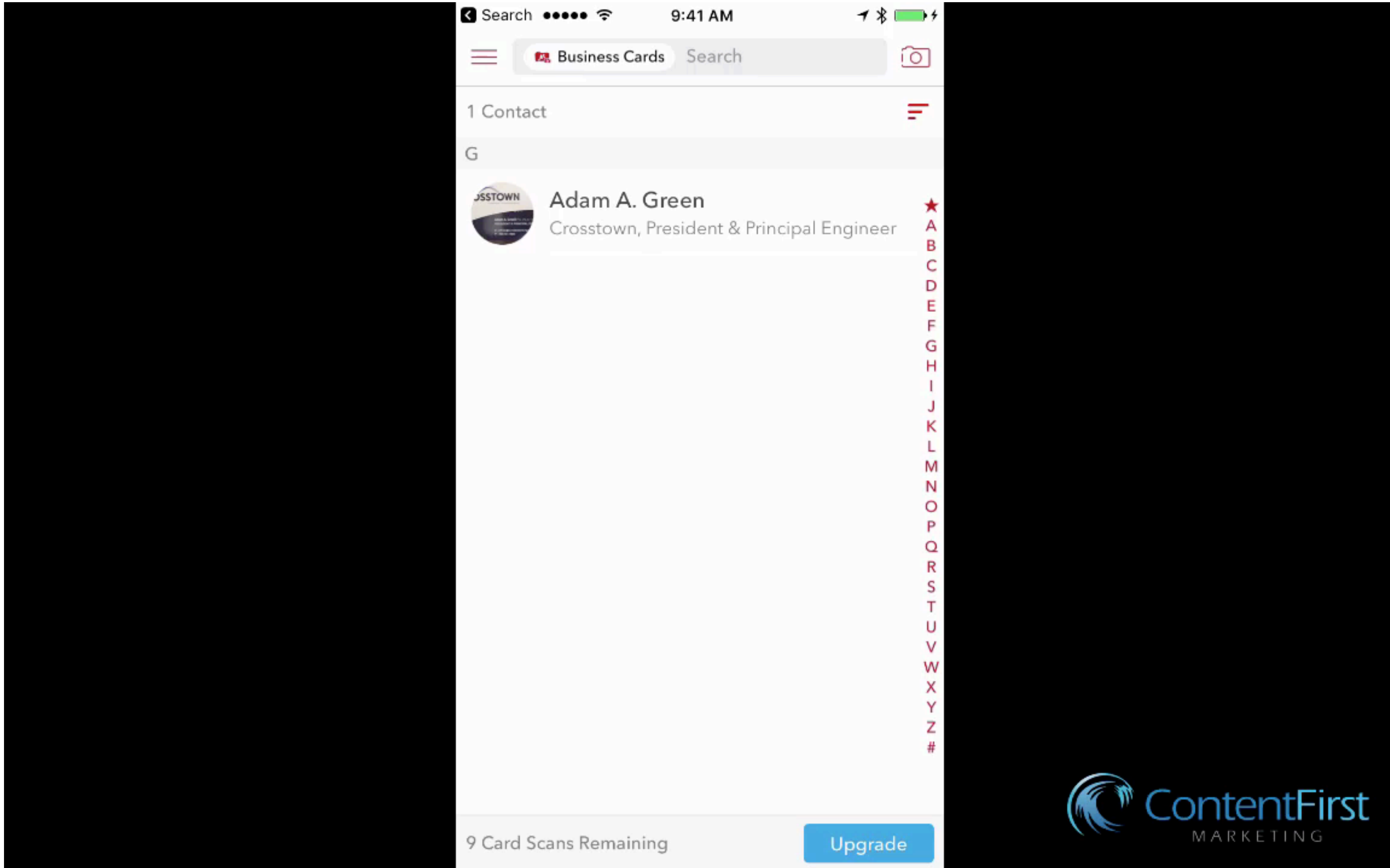
- Manual Entry into Outlook
- Marketing Automation Software like Infusionsoft
- Free version of Full Contact



# Using Full Contact

- Go to FullContact.com.
- Create a free account.
- When setting it up, connect it to your Exchange email account.
- Install the Full Contact App on your iPhone.
- Watch this 1 minute video <https://clearagainmedia.wistia.com/medias/t808sqpa0f>
- Snap a picture of someones card
- When the card is finished transcribing, check your outlook to see if the contact arrived...this may take a couple minutes.

# Full Contact



## eMail Nurture

Enter the business card  
or  
Snap a picture and transcribe

Send the Nice To Meet You  
eMail

One Time

Send the Automated Series  
Scheduled with Delayed Sends

Add into Consistent Digest  
Broadcasts to Distribution List

**Do the first two (NTMY and Automated Series) in one sitting**

# #1 Takeaway

How are you going to implement this week?



# Resources

Videos located at <https://contentfirst.marketing/insperity-training>