



PART 1

Marketing Systems that Bring People to your Sales

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Direct Mail as a Marketing Vehicle



In today's high-tech world, it's easy to forget about the power of snail mail.

Social media, online presence, and email marketing should all be essential parts of your marketing strategy, but don't discount the effectiveness of a postcard!

In this packet, we'll share the exact policies and procedures we use to delight our clients with direct mail. You're welcome to use them in your own business!

Our goal at Upleveling Your Business is to help you build the right systems for your business - the systems that will allow you to grow sustainably and build a business that allows you to thrive!



Chapter 7: DIRECT MAIL CAMPAIGNS.

A. Direct Mail – Postcard Campaigns.

The Marketing Team shall on occasion use postcards to reach audiences in a more kinesthetic way.

1. Planning.

- a. Decide on the postcard campaign and theme.
- b. Be clear on end goals.
- c. Set a clear tracking method (URL/ QR Code/ phone number has special code or tracking).

2. Set a Timeline.

- a. The Marketing Team shall assess the project and determine a reasonable timeline given the scope of the project (mailing locally or across the United States), the type of content (certain industries like legal need pre-approval in some states depending on content), the size of the mailing (500 vs 50 can impact time to prep), etc.

b. Example Timeline with extra time – 30 days

- _____ Date Received by Audience
- _____ Date Mailed (+3 days)
- _____ Date Mailing labels and postage applied (+1 day)
- _____ Obtain Postage or plan metered postage (+3 day)
- _____ Pick up Postcards or received them (+ 5 days)
- _____ Order Postcards (+ 10 days)
- _____ Finalize Postcard Layout (+1 days)
- _____ Preliminary Postcard Layout (+3 days)
- _____ Ideas handed to Creative Designer (+3 days)
- _____ Final Planning by Marketing Team with Clear Instructions (+2 days)

3. Set style of Postcard and size.

*** Note USPS size requirements for mailing labels and size of card for different postage prices.



4. Assign to Creative Designer.

It is vital that the Marketing Team shall give the Creative Designer clear guidelines so that the designer can craft an appropriate product the first time rather than many extra re-drafts.

5. Review and Final Edits.

The Marketing Team shall always have at least 3 sets of eyes look at the final version before going to print to help identify any typos or errors such as names, spelling, address, phone numbers, dates, time zones, links, QR codes, etc.

6. Preparing List, Labels and Postage.

The Marketing Team shall decide if using small address labels only, or whether using labels for the whole right side with postage, return address and name of recipient as part of a mail merge and mass mailing pricing.

7. Preparations for Sending.

The Marketing Assistant shall ensure care is taken in tracking the preparation of labels to ensure that correct addresses are used and duplicates are not inadvertently included. A spreadsheet or other digital tool can be very helpful to keep track if a multi-day preparation is in order.

8. Tracking Receipt and Responses.

With all types of marketing, the Marketing Team shall have a methodology for tracking when postcards are received by intended audience as well as

- a) Option 1: send 5 postcards to friends or acquaintances and ask them to let you know when they are received via mail.
- b) Option 2: use a tracking method with the mailing like a delivery receipt (more commonly used in larger mailings or packages than postcards)
- c) Option 3: have a URL/ QR code/ or other tracking method and encourage people to go to the page when they receive the postcard for a special prize or item.



PART 2

Sales Systems that Help Your Conversion Rate

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The Pre-Conditioning Process



Before learning about the Pre-Conditioning Process, think about how you want to make people feel when they first contact your business in some way, shape, or form.

The Pre-Conditioning Process is the funnel from the first contact with the potential client all the way through the moment when the potential client has an honest sales conversation with our sales team about our services and products.

In this packet, we'll share the exact policies and procedures we use to delight our clients from their first point of contact in their Customer Journey with us. You are welcome to use them in your business.

Our goal at Upleveling Your Business is to help you build the right systems for your business - the systems that will allow you to grow sustainably and build a business that allows you to thrive!



Chapter 2: THE PRE-CONDITIONING PROCESS.

1. First Contact.

We receive leads from a variety of sources, and it is important to recognize that the different leads' sources may dictate a different process.

a. Front End vs Back End Marketing

For instance, leads that come from backend marketing (marketing that targets people who know us, like us and trust us) will often result in a hot lead who wants to move forward right away and we may want to “fast track” the leads.

In contrast, leads that come from front-end marketing (marketing to new people who don't yet know us, like us, and trust us such as online leads, website, social media, online directories, etc.), may need more pre-condition to tell them more about what we do, what we stand for and what it is like to work with us.

b. Common Lead Sources.

- i. Referral Program
- ii. Email Introductions
- iii. Facebook Business Page
- iv. Facebook Messenger
- v. LinkedIn Messaging
- vi. Instagram Messaging
- vii. Phone calls
- viii. Text
- ix. Website
- x. Online Chat
- xi. Online Lead Generation sites
- xii. Event Marketing
- xiii. Marketing Campaigns
- xiv. Ads



2. Warming the Audience.

Resonating with your ideal client is important to create that synergy and reaffirm to them they are in the right place and that you are the right team to help them. As we commence this relationship with the lead it is vital to consider the following:

- Proper Etiquette: Always engage in proper etiquette when responding to an email or chat or text. The person should feel they are our most important communication of the day.
- A Smile Can Be Heard: A smile can be heard when answering a phone call or even in the nature of a typed response. Be polite and joyful.
- Quick Answers: If at all possible, ensure the phone is being answered on the first ring.
- Hold “Music”: Rather than have hold music, have a set recording of short testimonials by happy clients.
- Waiting Room: Have testimonials and happy client photos in the waiting room.

It is important to also keep in mind what deters good clients. Slow to answer the phone, long hold times, a receptionist who can't find a pen to take notes, and a receptionist who doesn't know key info like email addresses, website addresses, etc. are all items that can severely damage the relationship before it starts.

3. Pre-Conditioning Prior to Sales Conversation.

A.First Phone Call or Contact: As identified above, when you bring a good positive energy and are organized, this can convey to the potential client they are in the right place. Clear questions asking how we can help and triaging the situation is crucial. It is equally as important that the Intake Specialist have confidence that our product or services can help them move forward and in turn this confidence will instill confidence in the caller to schedule or take the next steps.

If scheduling a sales consultation is part of the system, then having good availability and a good process to schedule is imperative. It can be a complete trust buster if the potential client makes the decision to schedule a consultation and then the Receptionist or Intake Person is sloppy or doesn't know what they need to do to make that happen.



Once the appointment is made, each confirmation of appointment shall contain the following elements:

- 1.Date
- 2.Time
- 3.Place
- 4.Length of Time
- 5.Expectations
- 6.Other logistics or information related to the call.

B. Email Sequence: knowing our clients' pain points and challenges provides us with the opportunity to create an email sequence to address their concerns and fears.

1. What to Expect/ Confirmation of Appointment
2. Story about a client in a similar circumstance showing their journey/ transformation
3. Video from the Owner (Bonjoro or other)
4. Roadmap
5. FAQs.

C. Welcome Package: As a pre-conditioning tool we may send a Shock and Awe Package, or we may opt for a more inclusive Welcome Package. The timing of such a package is determined by the urgency of the event and the time frame for shipping a package before the Sales Consultation. It may be that this package is better suited as a Welcome Package after they sign up.

4. Reminders.

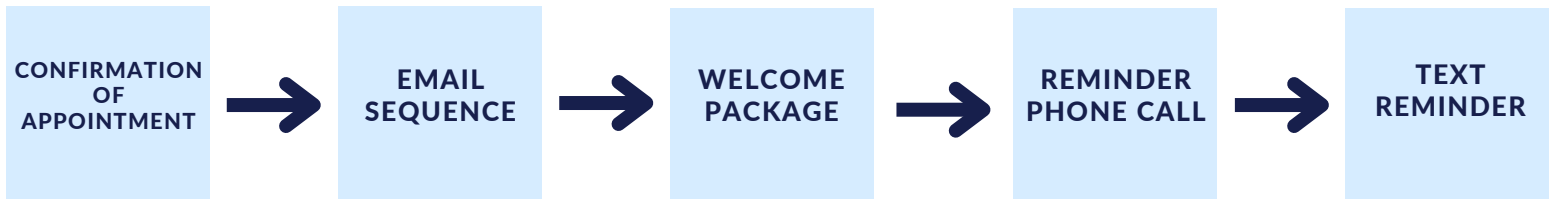
It is the goal of the company to remind the potential client of the sales conversation date and time via email (using the email scheduler) as well as SMS text).

- a. E-mail Reminders
- b. SMS/MSM Reminders
- c. Phone Call Reminders

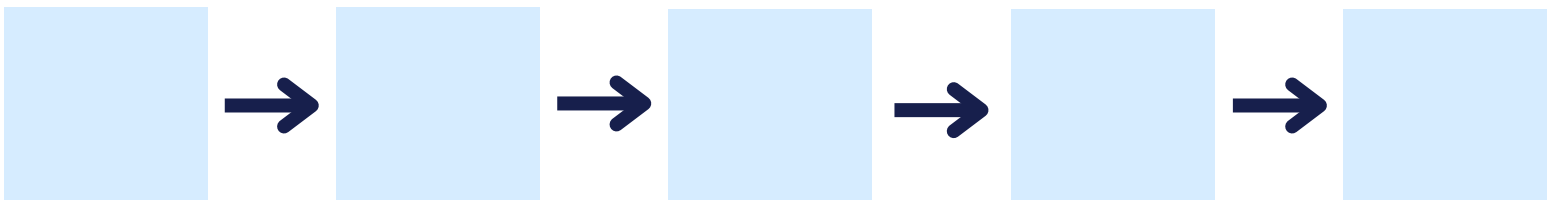


YOUR PRE-CONDITIONING CAMPAIGN

The Upleveling Your Business Way:

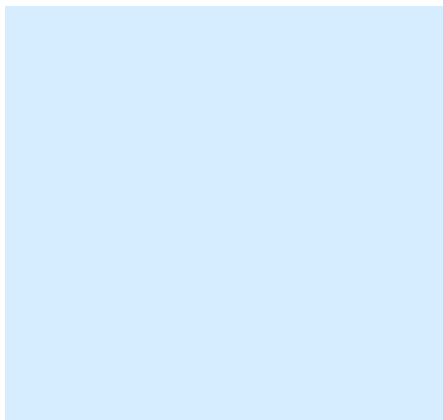


Your Pre-Conditioning Campaign:

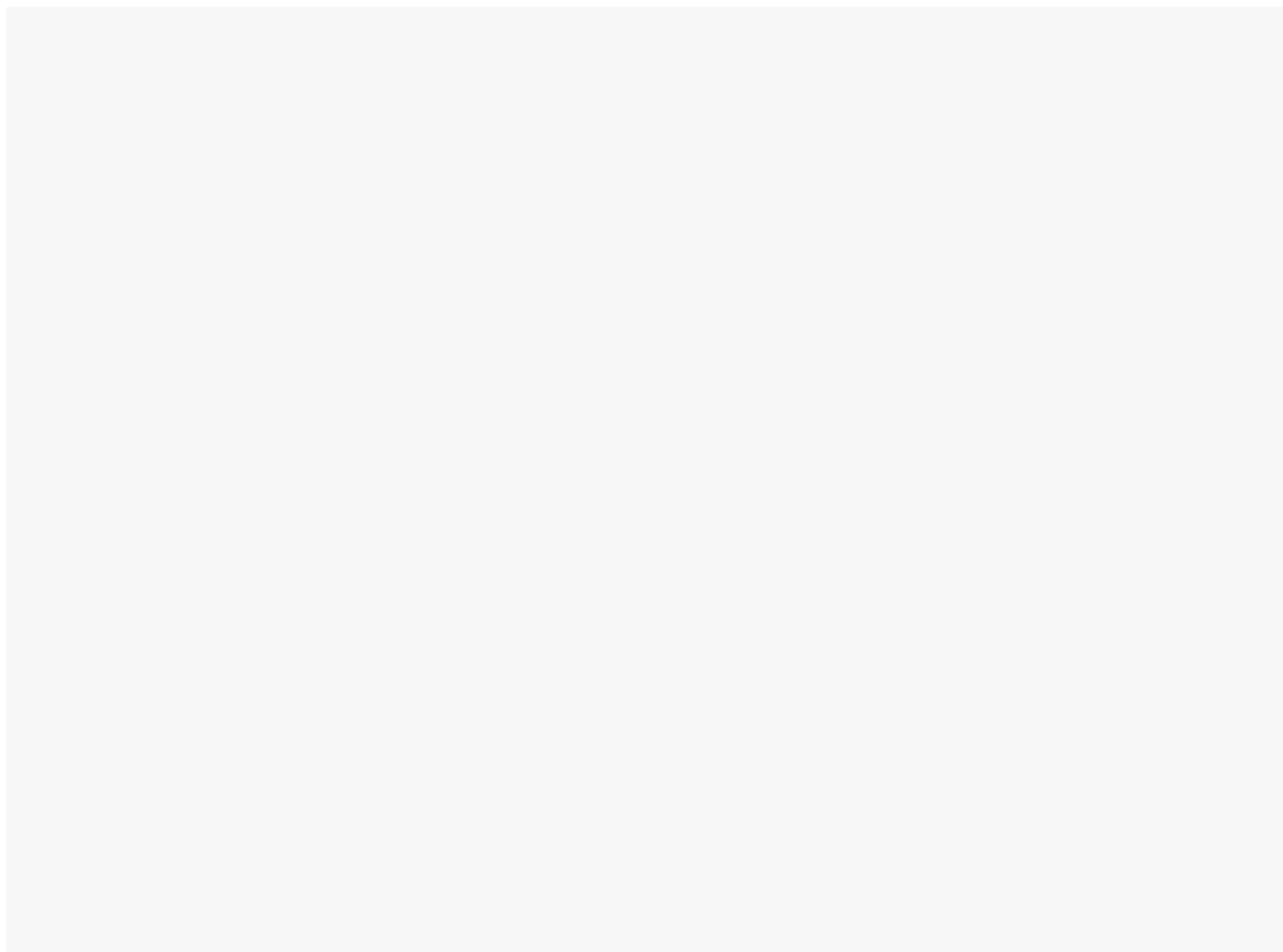




YOUR PRE-CONDITIONING CAMPAIGN

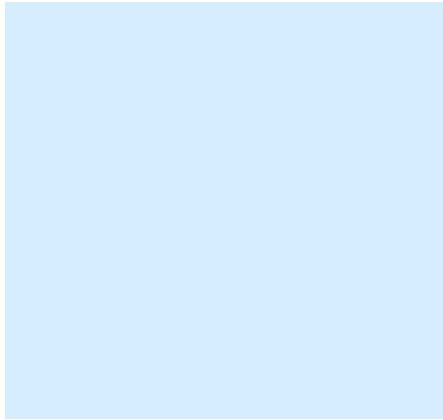


What to Expect / Confirmation of Appointment

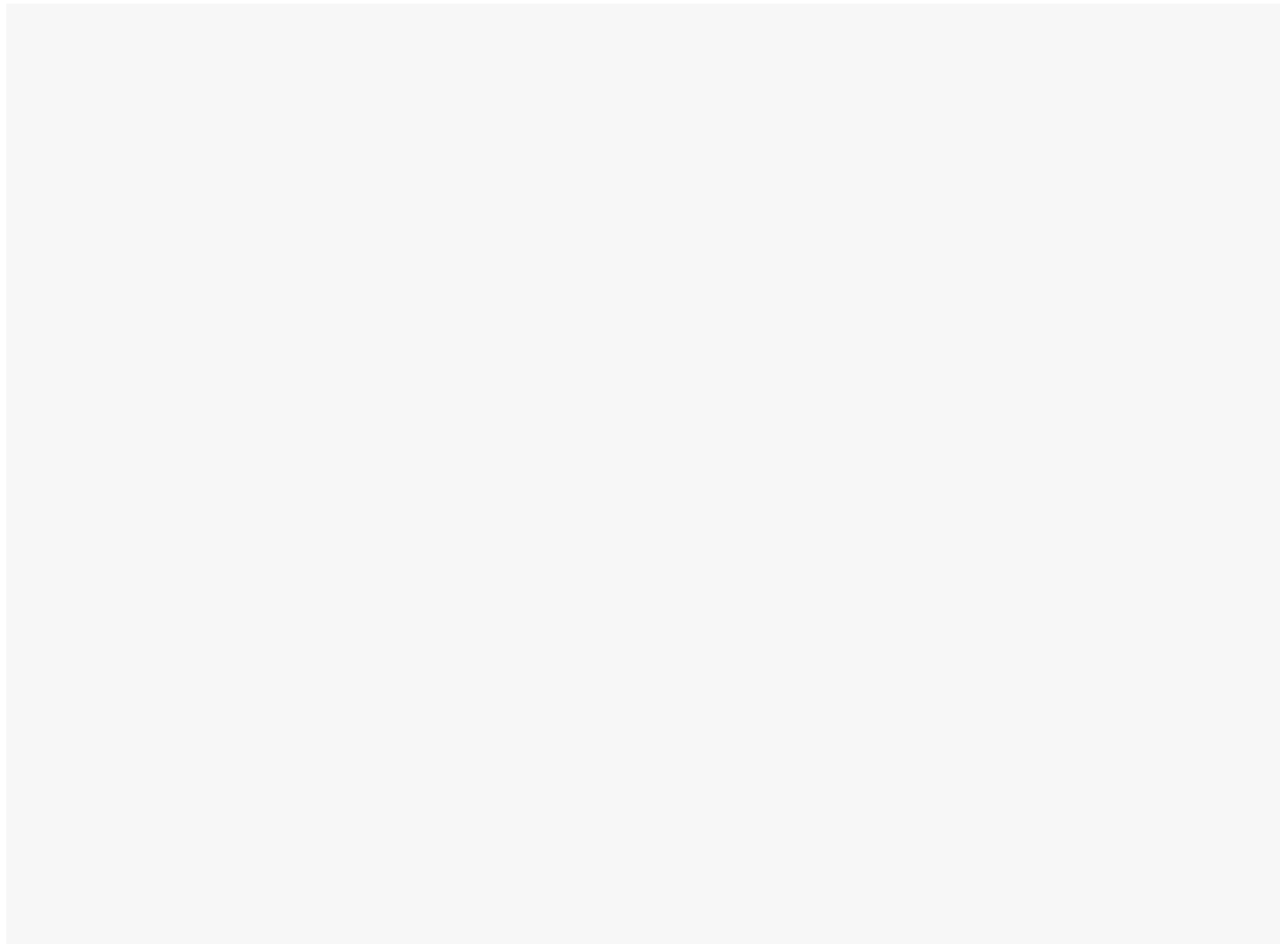




YOUR PRE-CONDITIONING CAMPAIGN

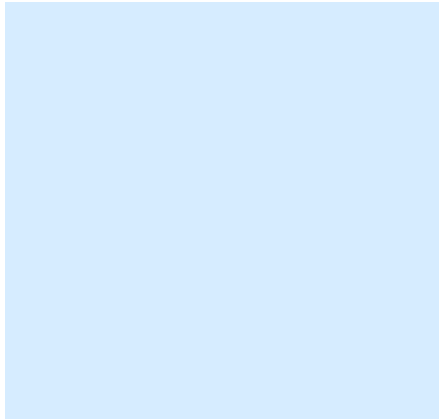


Story About a Client in a Similar Circumstance Showing Their Journey/
Transformation

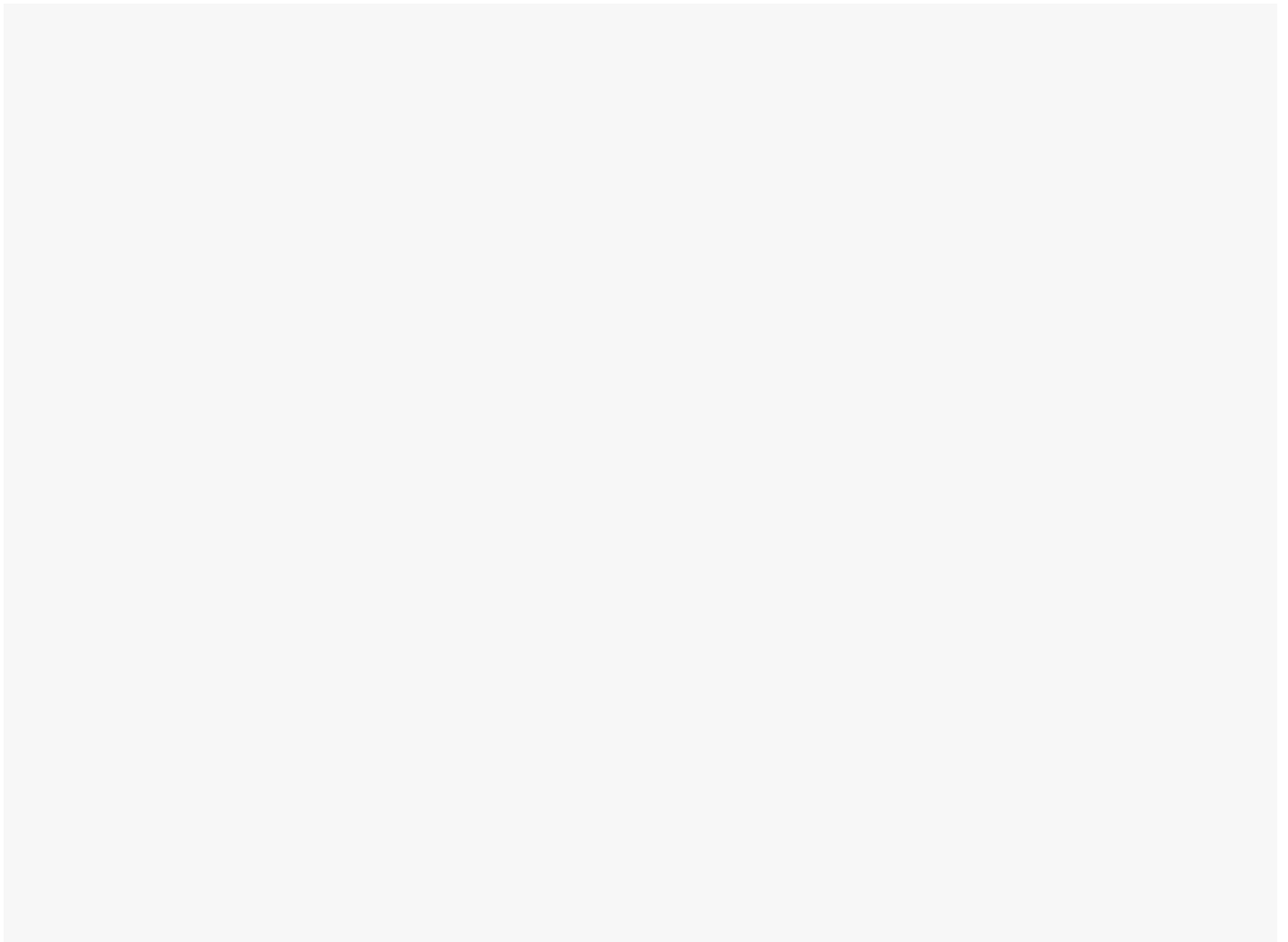




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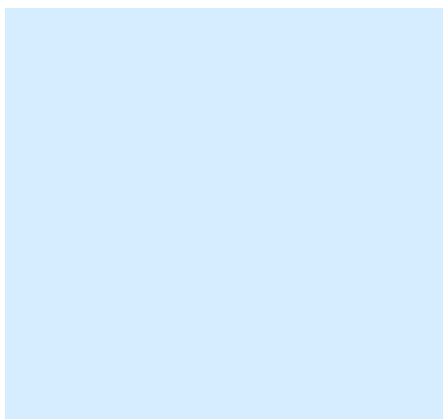


Video From the Owner (Bonjoro or something similar)

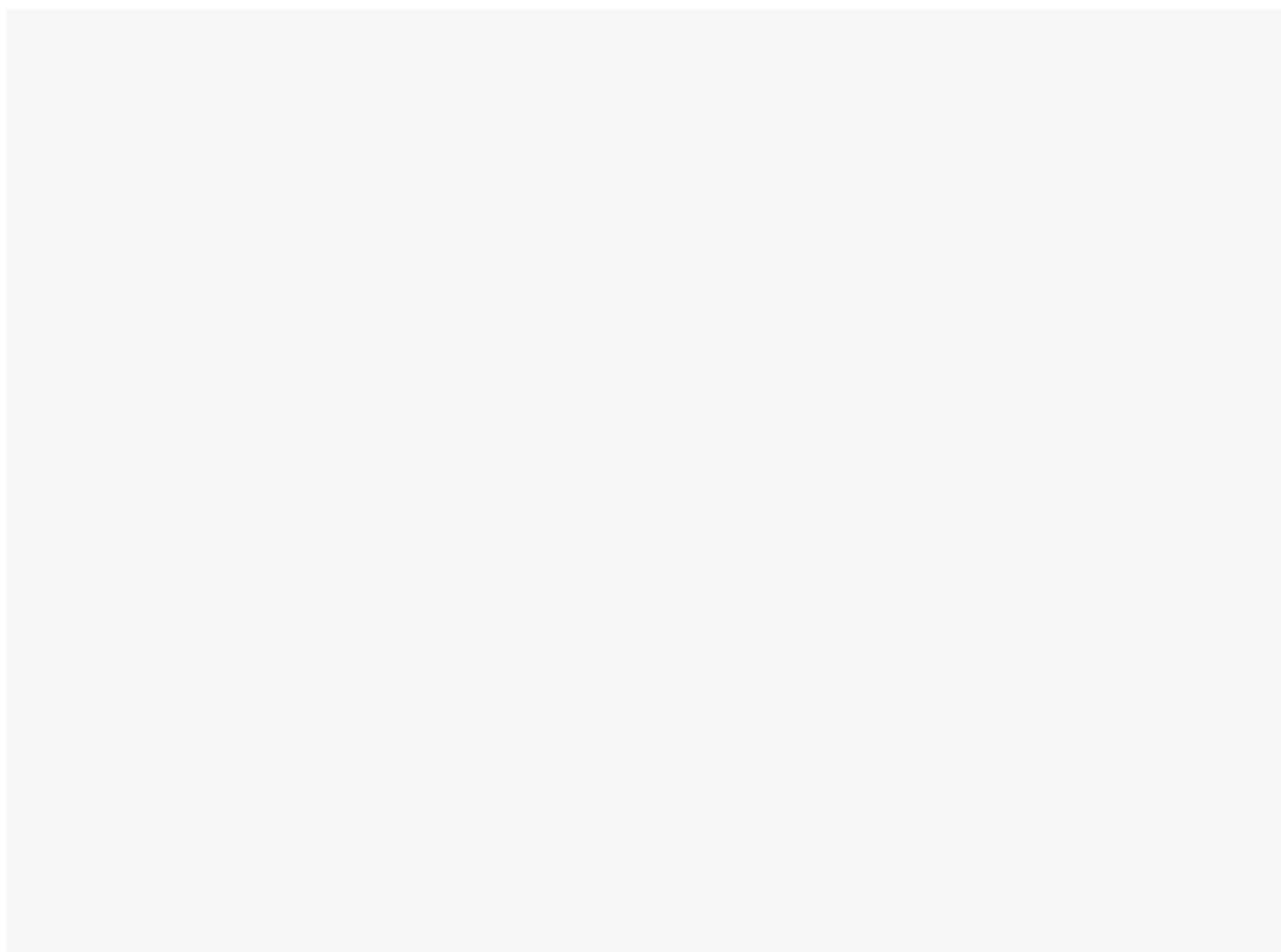




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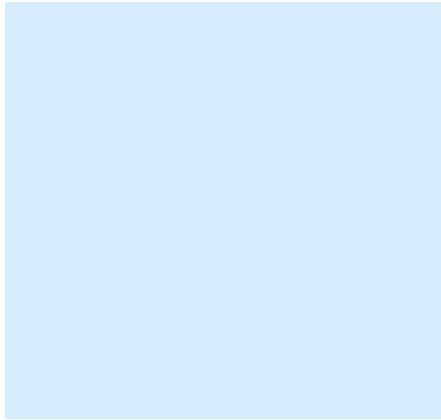


ROADMAP

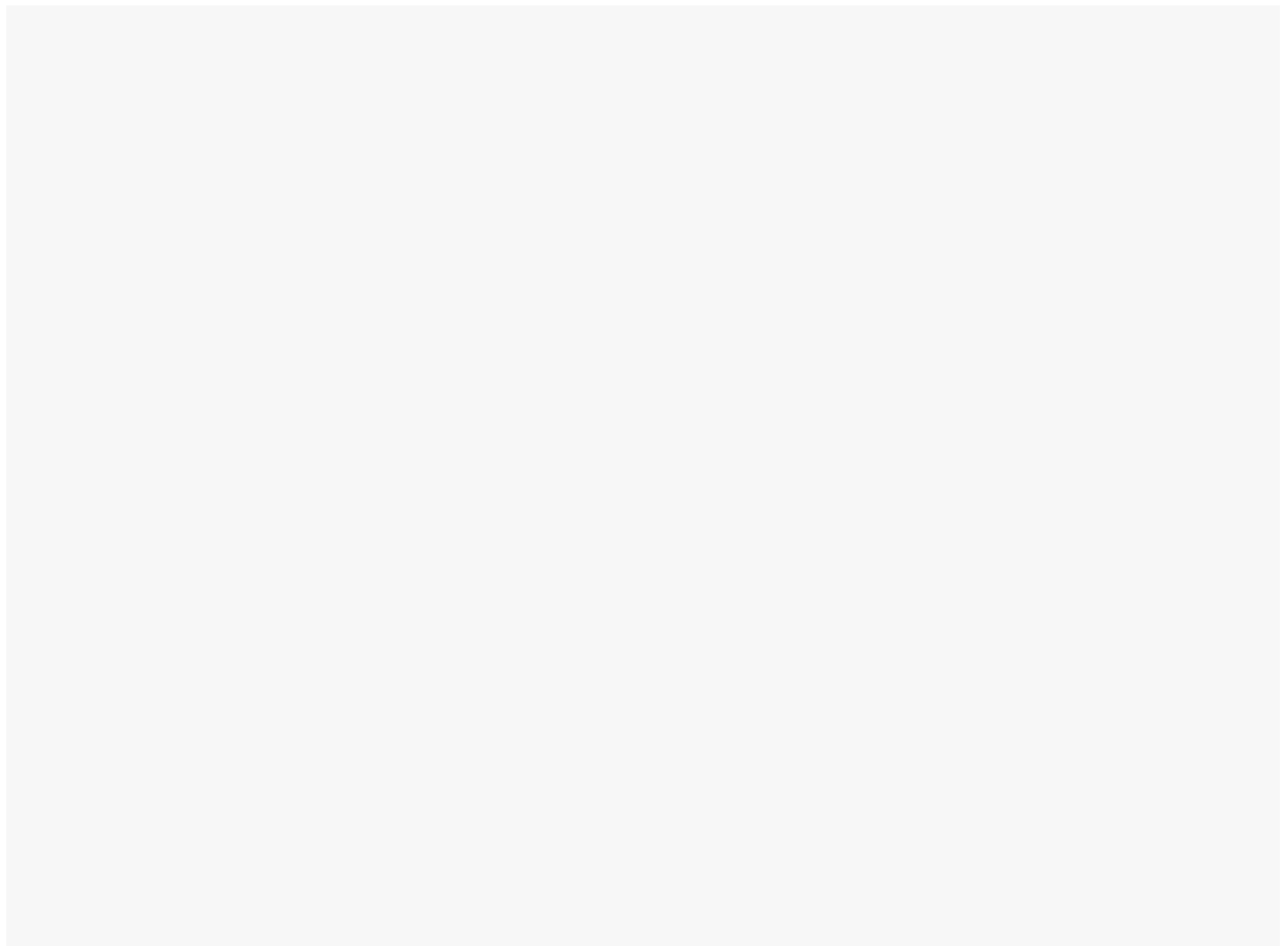




YOUR PRE-CONDITIONING CAMPAIGN



FAQ'S



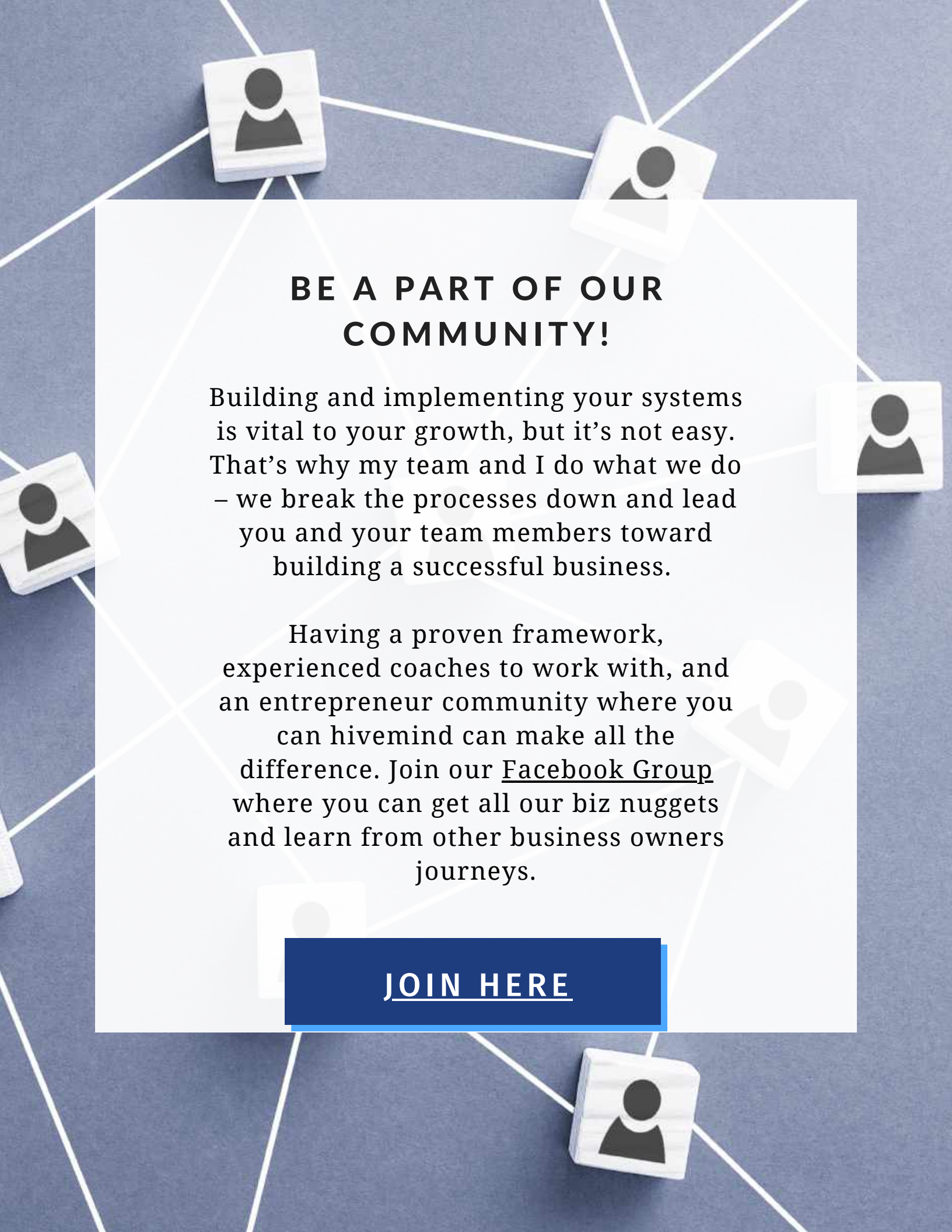
WANT 1:1 HELP BUILDING YOUR SYSTEMS AND DEVELOPING YOUR TEAM?

Strong systems are the foundation of any successful business, but building them isn't easy. It takes time, a solid framework, and intentional planning & action.

You're busy running a business - you don't have time to play "trial and error" with your systems or your team. That's why we developed our Systems Packages: to equip you and your team with everything you need to build the strong systems you need, the first time.

Ready to grow a profitable, sustainable, systems-based business? Click below to schedule a free, no-obligation call with a UYB Specialist. We'll listen to your needs and goals - and we'll help you find the solutions that will work best for your business and your team!

SCHEDULE
YOUR CALL



BE A PART OF OUR COMMUNITY!

Building and implementing your systems is vital to your growth, but it's not easy. That's why my team and I do what we do – we break the processes down and lead you and your team members toward building a successful business.

Having a proven framework, experienced coaches to work with, and an entrepreneur community where you can hivemind can make all the difference. Join our [Facebook Group](#) where you can get all our biz nuggets and learn from other business owners journeys.

[JOIN HERE](#)