Unit 5 Prompt: Elizabeth's Marketing Agency

Meet Elizabeth. She is the owner and founder of a small media marketing company, established 3 years ago. They specialize in a wide variety of marketing services such as, social media, email marketing, SEO (Search engine), and reputation management. They generate income through contractual agreements with clients - e.g. we agree to implement ___ type of marketing using ___ methods/strategies on _____ websites/platforms for ___ length of time for ____ amount of money.

She has been able to keep things running with a small, but skilled team of 8 people. They are receiving more business than ever, but don't have the financial capacity to hire more people, yet. As such, they are looking to empower their team to handle more projects, while working the same hours with less stress. Elizabeth readily acknowledges that many of their problems stem from a lack of helpful technology, and is ready to modernize how her business is run.

Traditionally, they have kept all their business records in Excel spreadsheets but, as their business grows, it is getting a little chaotic. Their team struggles to remain on top of tasks, follow required procedures, and often fail to document key client information.

They have never used a CRM before, but are excited about the potential efficiency and organization it will bring to their business. Below, are Elizabeth's comments regarding some organizational issues her company is currently struggling to tackle and some desired functionality she would like out of her new system:

NOTE: Don't feel like you have to build the system the same exact way in both HubSpot and Zoho. The free version of HubSpot is going to be capable of different things than the trial version of Zoho. So read through Elizabeth's pain points, map out the customer lifecycle as best you can, and use the information you gather to improve their system as best you can.

CRM Organization

"*One of the first issues I want to tackle is our Contact organization. Currently, our Contact list for our Direct Clients, White Label Clients, and Partners are housed in the same 3 Excel spreadsheets, even though each of those clients may be in an entirely different stage of their customer lifecycle (e.g. our current clients are mixed with our leads and past clients) so I just want to be able to more easily find current clients, or leads, without needing to mess about with a bunch of filters and sorting options.*

For people who have ongoing deals (current clients), we are a little bit *disorganized in terms of associating deal information with deal and ongoing project information. We currently track the progression of deals through a project management software called Trello. But when trying to find a Trello entry for associated with a contact, we have to sift around and search through the hundreds of other projects until we find it - essentially we are just looking for something thats a little bit more quickly accessible and user-friendly.*

This leads to another issue which is data integrity. Since our deal tracking system is completely separate from the documents that we record contact information, this leads to an inevitable disconnect between the information that is logged (e.g. when a deal closes or is lost, this is often not reflected int he contacts sheet, so a deal may be marked as closed in Trello, but will still be marked as ongoing in our spreadsheet). The prospect of finally using a CRM to organize all of this is very exciting, we just need help moving all of our contact data over from spreadsheets and setting up the foundation of the CRM.

Better reporting is another thing that I am really excited about. As of now, we have no reporting at all, really, and its very frustrating. I would love to have a dashboard which communicates all the deals in our pipeline - what stages are most of out deals in, the total value of all deals in our "Proposal" stage, all open tasks - stuff like that. We can handle the clean-up when its time to import everything to the new CRM, but I need some help constructing a strong foundation to slot all of our records into so that we dont have the same problems going forward."

Process Management

"Right now all of our Leads come in through email, then are manually entered by our staff. It's not only time-consuming, but also not a very good system for consistently collecting Lead information (people arent very specific about what they are looking for) I Ideally, every lead that comes in would contain contact information, the type of marketing they are intersted in, platforms they are looking to run ads on, and their total budget. It would also be great if a notification to be sent to my sales rep, Samantha (we just have the one sales rep responsible for reaching out to all our Leads right now). Typically, we want our leads contacted within 3 days of receiving them. I would like to be able to hold her accountable to that timeline. I just want to see if there are any Leads whose outreach is overdue.

Here is the process our team generally follows when qualifying Leads:

- *After leads come in, there should be a 15-minute-long follow-up call to determine* *what industry they work in, where they are located, and confirm a rough estimate of how much they are looking to spend on ad campaigns. If they are still interested, we change that Lead to a contact and create an ongoing Deal. and leave any relevant notes. If they are not interested, that Lead is lost and we don't touch them again.*

- *A significant amount of leads we receive, don't respond when we reach out to them. If this happens, they need to create some sort of reminder to follow-up with them in a few days. If they don't respond after a second attempt, we just mark it as junk and don't waste any more time with them.*
- *Emailing Leads can be a bit tedious, at times, because the content of lead outreach emails is largely the same. Some employees just keep some content on a separate document that they will copy and paste into a new email, while others will just type the same thing over and over.*
- *Along the way, there is a lot of information that I wish my sales people would enter, but often gets forgotten or just not entered out of laziness. Is there a way to force people to record information consistently every step of the way? Or at least have some sort of sheet or form that they can fill out with all the information that needs to be collected on that 15 minute call?*
- *If leads end up being lost, one thing I need my employees to do a better job of tracking is WHY Leads are lost. I have no visibility into this and it is very frustrating. The most common reasons Leads are lost are: having already found a different marketing agency to work with or they are no longer interested in marketing services. If I could have all lost Leads fall into one of these two buckets, and maybe a miscellaneous option as well, then it would be easier for me to get a little better visibility into what we need to change in order to convert more Leads.*

"A lot of the same issues exist for our Deals pipeline. I struggle to get my employees to enter required information and would love it if this new system helped our employees in that regard as well. Let me quickly walk through our process for closing deals, then you can provide some system recommendations regarding how this process could be streamlined:

- *When Deals first get created, they are in a discovery stage. This essentially means that we still need to talk with the prospective client to figure out what their needs are and what the scope of the project will be. To move the deal to the next stage, we just need to get on a Zoom call with the client to talk to them for about an hour, taking notes about what they are looking to advertise and the* *demographics they are looking to promote to. After this call, we have our my employees to document which social media platforms the client is interested in running ads on.*

- *When this call is finished the deal moves to the next stage where we generate a proposal for the client with a cost and time estimate. This is pretty straightforward. We will estimate the length and scope of a project and present a total cost of services to our Client.*
- *After generating a proposal, we email it to the client and give them a few days to review it. During this stage, there is not a whole lot to do but wait for the client to get back to us. Before a deal moves on from this stage, however, we want to document the project timeframe. From here, they can either accept or reject our proposal.*
- *If they accept and sign our proposal, we want to record the date that the proposal was signed, then record that deal as being Closed-Won.*
- *If they reject our proposal, we would record the deal as being Closed-Lost and document the reason the Deal was Lost. If possible, I want people to be able to select from a pre-defined list of options WHY the Deal was lost so that I can have visibility in reporting (please set this up as well) into where we are most often falling short. The most common reasons we lose Deals are: our rate is too expensive for them, we lost them to a competitor, or they are no longer interested in marketing services.*

These are the most salient things to focus on for our new system, but if you think of any others which might be of benefit to us, feel free to add them to the scope of the project. I'm excited to see what you come up with!"