SharpSpring

The Guide to Growing Your Agency With Marketing Automation

Sign more clients. Get more retainers.
Expand your services.

In this page, you'll find advice from three industry veterans:

Your Secret Weapon for Getting New Clients

It’s about placing marketing automation right in their hands

About the Author

Niall Durkan is the President and Founder of Durkan Group. Before open-source content management systems even existed, Niall was leveraging his experience in application development to craft custom web solutions. In 2003, he cut the corporate cord and started a full-service digital agency just outside of Philly.

During high school, a friend of mine worked at the local pet store selling puppies. Like at most pet stores, the puppies were popular, so he thought selling them would be easy. But he quickly learned – as he watched throngs of kids begging “Mom, pleeease” – that the moms said no. Out of desperation he changed one small part of his approach, and he quickly earned a new moniker: “The Closer.” When a kid begged for a pup, my friend quietly lifted the puppy out of its crate and handed it to mom.

Game over.

Why did it work? Because there’s a world of difference between looking at a puppy through a window and actually beginning to bond with that ball of energy in your hands.

“Handing Over the Puppy” to Prospective Clients

When we sell marketing automation as part of our full digital web offerings, we essentially do the same thing my friend did in the pet shop.

I use our SharpSpring partnership as an added value in our service offerings, but I also rely heavily on the technology to prepare for my pitch meetings as well as to find prospective clients.

We lift the wall that divides the user from the product, and we allow them to get comfortable with the technology before buying it. But we do it in a way that feels familiar and comfortable, because we use the client's content and data during our pitch.

Most of our clients know something about marketing automation, so it's not a totally foreign concept, but they typically don't have first-hand knowledge. Just like with that puppy in the pet store, we take out the platform, show it off and then explain all the benefits. We demystify the technology and show the unmistakable truth for most companies: Marketing automation is too good to pass up.

Since we are a full-service digital design agency, our main focus is building, hosting and designing amazing websites. Selling marketing automation is not our main focus, but it is very much part of our process. I use our SharpSpring partnership as an added value in our service offerings, but I also rely heavily on the technology to prepare for my pitch meetings as well as to find prospective clients.

In this article, I will walk you through how I *use* marketing automation to *sell* marketing automation. Whether you already have tons of clients on a platform or you're looking to convert your first, integrating marketing automation into your own strategy makes finding new clients, piquing their interest and getting them to say yes much easier.

FINDING THE CLIENT

When I see a company looking at us:

First, I find the client on Google. Then I take a look at what content they were viewing on our site as well as perform a review of their site.

Then I head over to LinkedIn to find the main contact for that company.

Last, I send a hand-written postcard offering our services.

Finding the Client

In the case I'll be presenting, I found the client via anonymous traffic. I regularly look at SharpSpring's VisitorID feature, which shows site visitor traffic, both known contacts and anonymous. In about 20% of the anonymous traffic, VisitorID is able to identify the company. This means I know the name of the company but not the individual.

When I see a company looking at us, I'll check them out on Google, take a look at what content they were viewing on our site, and then do a review of their site. If I notice their site could use a redesign, isn't mobile-friendly or is a bit dated in its layout, there's a good chance the person who was looking at our website is ready to use our services. I can confirm that when I look at the path they took through our site. Then I head over to LinkedIn to find the main contact for that company.

I'm a fan of the handwritten word. In this day and age, it's not often that you receive a handwritten note, let alone one that has been given some thought. I have nicely branded cards for the occasion, whether I'm writing to a cold lead or an existing client. In this case, I could have picked up the phone and made a cold call, as I did not have the contact's email, but instead I took the route of using a hand-written postcard. It's professional and yet still personal.

I wrote something like. *"I noticed that you or someone at your organization visited our website. We are a full-service digital agency right in Malvern.*

I believe we can elevate your company on the digital front. Feel feel to contact me to discuss." I put the postcard in an envelope, dropped a business card in with it, stamped it and addressed by hand. I use the (Malvern) location reference if it's a local company, which was the case here. Sometimes I'll reference specific things I noticed on their site or mention how we have worked in their industry, if applicable.

Getting Initial Buy-In

My postcard hit the right person, and a meeting was set up at our office. The first question out of his mouth: *"How did you know I was on your site?"* I anticipated this and had a quick demo ready to show off SharpSpring's VisitorID, being sure to mention that a bit of code does all the tracking. (I'll ask the client to plug this code in during a later demo, so it's good to educate early.)

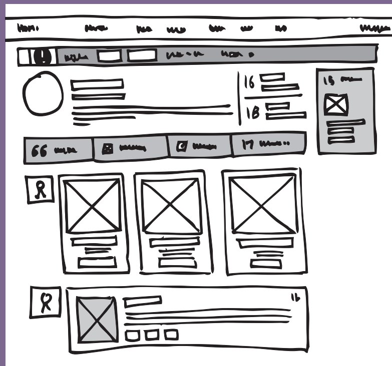
I welcome this question because it's a great ice breaker. Before we knew it, the client was opening up, and my team and I were learning about his company and the areas in which we could help. It was quickly apparent that they needed us and that the company was ready to move forward. Next was a visit to the C-suite, so I had to prepare a pitch that would wow people at every level.

When prepping for the C-suite meeting, I incorporated the company's data, lingo, prospects, etc., wherever I could in my pitch.

Personalizing Your Pitch

When prepping for this meeting, I incorporated the company's data, lingo, logo, prospects, etc., wherever I could in my pitch. The truth is, I could talk

PERSONALIZING YOUR PITCH



Forget the lorem ipsum and use the client content or something similar – they'll be more comfortable and open, and that will transfer over onto whatever you're pitching.

IT'S ALL ABOUT THE PREP WORK BEFORE THE MEETING

about the benefits of our company and marketing automation all day, but personalizing the pitch and the demo make the biggest impact.

I started to use this technique after reading *Rework* by Fried and Heinemeier, the founders of 37Signals, now Basecamp. One of the key lessons I took away from the book was the importance of framing your pitch (to the greatest extent you can) within a context that the potential client will understand. Forget the *lorem ipsum*. If the client identifies with the context you're presenting – because you're using their content or something similar – they'll be more comfortable and open, and that will transfer over onto whatever you're pitching. It's all about the prep work before the meeting.

Step 1: Set Up a Mock Instance

Before I meet with the client, I create an instance for their company in SharpSpring. This literally takes minutes and can be done a day or two before the meeting. After creating the instance, I send the tracking code to the client, explaining what the code will do and how it works. Then I ask the client to add the code to their site.

Within a few hours after adding the tracking code, I'm able to see who is visiting their site through VisitorID, and at a glance I can see some of the companies are legitimate prospects. It is a given that the companies listed in VisitorID are really only useful for B2B clients, which make up most of our client base.

Every client so far has understood that what I'm showing them is just the tip of the iceberg, and they usually stick around to see what more the technology can do for them.

At this point, it might seem like we are *giving away* that puppy – and the entire pet store – instead of just putting it into their hands. Yes, they aren't clients yet, but they're generally so impressed with our effort to set up an instance and show exactly what's offered, the risk that they'll take the information and run is minimal. Every client so far has understood that what I'm showing them is just the tip of the iceberg, and they usually stick around to see what more the technology can do for them.

Plus, I keep it very simple. For example, I don't integrate their forms. Although it's not difficult to do, it is a more involved process, so I keep that option in my back pocket in case we have another meeting and need to delve deeper. The first meeting is usually focused on the bigger benefits and not a lot of detail. This makes meeting prep quick and the presentation light and easy to digest.

Step 2: Load Contacts & Create Opportunities

Prior to the meeting, I created a sample spreadsheet to store contacts. It included columns for company, first name, last name, title and email, and 10 rows for the different contacts. I wanted to use real people, so I looked at some of the companies in the client's VisitorID and searched for employees of those companies on LinkedIn. I entered all column values for each of the 10 contacts, and then I simply guessed when it came to their emails (e.g., first initial + last name + @domain).

I started off by giving them a high-level explanation of marketing automation, and then I pulled up their mock instance in SharpSpring.

Next, I imported the contacts into SharpSpring. The nice thing here is that with some of the contacts, the import process was able to find their social profiles, so we had a face and social account links to go with the contact information. I then created opportunities in SharpSpring for five of the contacts. When it came to assigning each opportunity a name and a revenue amount, I just made educated guesses based on information from case studies on their websites. While we strive to be as accurate as possible to "speak the client's language," sometimes the details don't matter that much and our best guess is good enough.

Step 3: Set Up an Email

Then, I created an email that was tight, responsive and on point with the client's branding. The email was modeled to be an ideal follow-up email that the client could send to prospects after speaking with them on the phone. Since I had listed myself as a contact, I was able to send the email to myself, open it and click on the links to test everything.

Putting It All Together: Welcome to the C-Suite

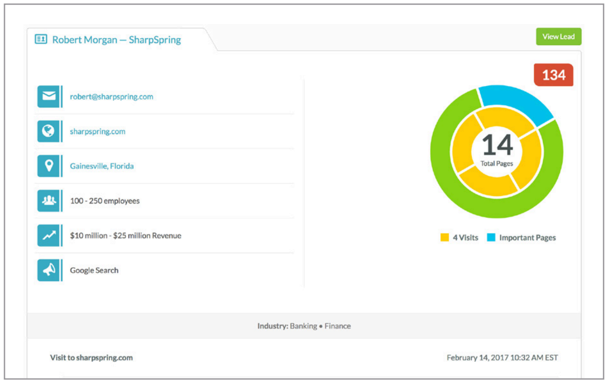
Now it was time for my meeting with the execs. First, we discussed their website in detail regarding branding, design and functionality. The second step was to explain this "marketing automation" thing that they already knew they should be using but didn't really understand why or how.

Show the Interactions

Execs were pleasantly surprised to see what companies were looking at their website.

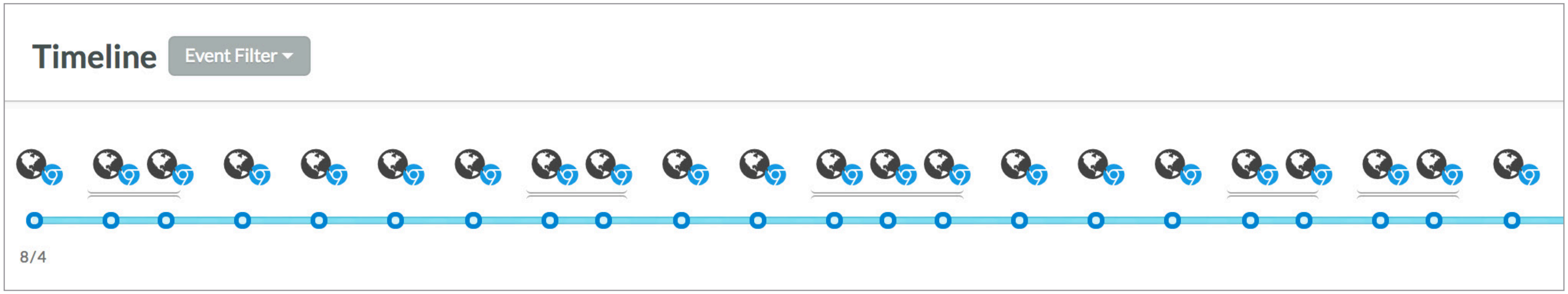
I started off by giving them a high-level explanation of marketing automation, and then I pulled up their mock instance in SharpSpring. I went straight to VisitorID, where the execs were pleasantly surprised to see what companies were looking at their website. I showed them the nifty look-up feature that reveals specific key contacts from the companies visiting their site. (They loved that.) I briefly explained that a quick look on LinkedIn usually fills in any blanks, such as contact information, as well as provides a way to directly contact that person, if needed.

VISITOR ID



Then we delved into the "Life of the Lead" feature. I explained that if someone clicks on a link in an email or fills out a form on the site, that person will become a "known contact." To show them what that looked like, I used myself, because I had already visited the site and clicked on the email links from earlier.

LIFE OF THE LEAD



I also clicked on three other random visitors with company info to look at their journeys through Life of the Lead. We could easily see one visitor was looking for a job, as he was spending his time primarily on the careers page. The other two were more clearly interested in the product, having each spent more than five minutes looking through product demonstration videos, case studies and product pages.

As I watched their interest increasing, I asked the execs, “Can you imagine how this VisitorID lights up with known contacts after you send an email to one of your lists? Better yet, when one of them comes back to your site 10 or 20 or 40 days later, you will know, and you’ll be able to see their intent through their behavior!”

Demo the CRM & Email Capabilities

I showed them the sample follow-up email I had designed, and we discussed the differences between “one-off” smart emails and emails meant to be sent to a larger audience. Through conversation, we identified which email templates and workflows would be applicable to different scenarios in their business.

I also showed them the sample sales pipeline, which was populated with opportunities. They all got a kick out of one opportunity I had created with an amusing title and outrageous potential revenue. The other opportunities turned out to be relatively in line with what the company normally encountered, which left me pleasantly surprised at my guesswork.

This particular client was unhappy with its current CRM and really liked what I showed in the demo. Obviously this varies from prospect to prospect, and you will find others who just want marketing automation integrated with their existing CRM.

Cover All the Other Stuff

It is a given that the demo described above only scratches the surface of what can be done with marketing automation. I wanted to be sure the execs had at least a basic understanding of its other capabilities, so I discussed the following as well:

- **Site & Adwords Analytics:** I mentioned that these are integrated and easily accessible via the marketing automation platform.
- **Lead Scoring:** By simply pulling up the configuration settings, I was able to give the execs a solid understanding of how it worked and how it could be customized both to their business and to their users' behaviors.
- **Tasks & Workflows:** We discussed how drip campaigns work and how to set up a solid workflow. I explained that while this requires more effort up front, it offers tremendous value over time, as it runs on its own and provides users with a great experience while further solidifying the brand.
- **Lists:** I showed them the importance of lists, especially dynamic ones based on user behavior. One asked: "Wow, so I can always have an up-to-date list of known contacts that visited news and product pages for a specific product line?" My answer was, "Why yes you can, and here is how!"

SharpSpring provides a great platform, and we provide the hustle and know-how as well as other related services our customers need, like web development and hosting support.

It's in the Bag...

After demonstrating these marketing automation capabilities using the client's data, it was no longer a question of "Do we need this?" but rather "We have to have this! What are the next steps?"

They could clearly understand that it wasn't just the tool that was impressive. My company was just as impressive, because we were able to understand their business and quickly implement a technology platform that had a meaningful return.

This example is a strong reflection of our partnership with SharpSpring. We landed the client, and it was easier to do as a result of the partnership. SharpSpring provides a great platform, and we provide the hustle and know-how as well as other related services our customers need, like web development and hosting support.

This approach may not be the end-all, but it has proven very effective for us time and time again. Multiple factors have contributed to our growth, but marketing automation has certainly been one of them, providing us with the ability to automate our processes and more effectively manage our sales pipeline. Since we started using SharpSpring, we've seen some great results:

- Our monthly recurring revenue has increased by **over 30%**.
- In our first full year of using SharpSpring, our revenue increased by **over 28%**.

Remember, the example I gave all started with a reach-out to a cold prospect, using snail mail. It's a small effort for a big reward. Now imagine how easy and effective it would be to use the same approach for existing clients.

My advice to other agencies looking to leverage marketing automation for their clients is twofold:

Use marketing automation for your own efforts. This proves you walk the walk and talk the talk.

1. Use marketing automation for your own efforts. Become very comfortable with the platform and understand it from a user perspective before presenting it to your clients. This proves you walk the walk and talk the talk. If you are comfortable with the technology, your clients will be as well.

2. Create all examples, emails, presentations, etc., using the client's data, and be sure to do the research and use general business sense when filling in any gaps in the information. This makes your presentation relatable and places everything in a more familiar context for your clients, so they can focus on understanding how marketing automation and your services will really benefit them.

Make no mistake, every pitch we give is first about what we do best – branding, building and designing websites. Then, we insert the marketing automation component to bolster our offering and smooth out the process. It may sound like a big effort to prep for this part of the presentation, but it's not. At most, it might take an additional hour or two, but you'll discover it's well worth it. Putting in that extra effort is something that many other companies aren't doing, and it's what will set you apart from the rest.

Want to read more on topics like this?

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See how adding marketing automation to your agency's services can drive revenue from existing clients and help you add new ones. Schedule a demo with a partnerships specialist to chat about your specific needs.

Get a Demo

Durkan Group

We are a full-service digital agency just outside of Philly. Crafting connected experiences that delight users and elevate brands is what keeps our hearts pumping every single day. When designing and developing the digital experiences that help brands thrive, there's never a moment we're not always-on. We are client-focused, creatively inspired and results driven. And we'll prove it.

Visit us at www.DurkanGroup.com.

5 Steps to Getting More Retainers

Using marketing automation and sales strategy as a foundation for profitable growth

About the Author

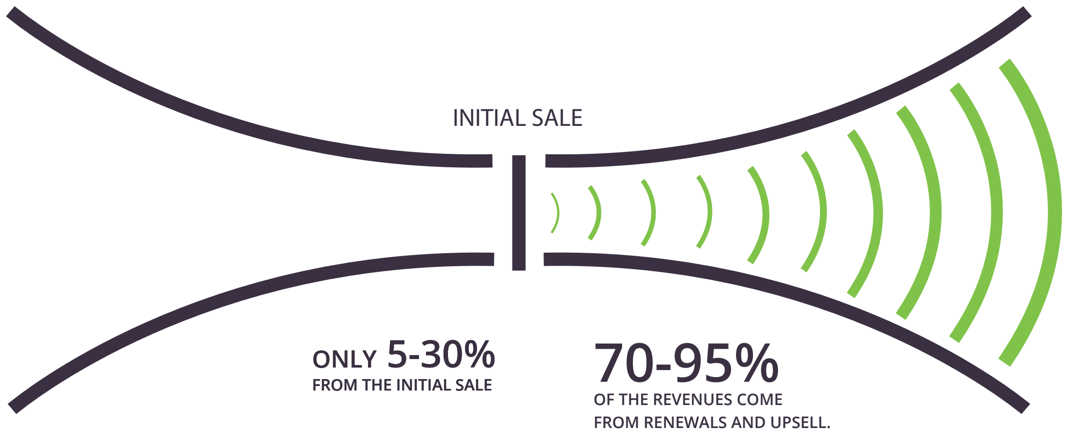
Paul Bresenden is an industry veteran who has designed and strategized for leading organizations around the globe. Paul leads 454 Creative with his broad expertise in web development, digital strategy, marketing automation, lead generation, and conversion optimization. He helps buisnesses connect marketing, sales, and technology to produce measurable and effective results for success.

Client relationships are like dating relationships. If a mutually beneficial connection is made, it's important to build a foundation of clear communication, trust, and willingness to look out for the best interest of the other party. At some point, the marker of a great relationship is ongoing commitment.

Why the big focus on retainer relationships?

The benefits of recurring retainers seem obvious from the agency perspective. The ability to forecast cash flow with some degree of dependability is paramount for any business. Creating predictability for revenue, labor, and resource allocation is one of best ways to drive growth and eliminate the stressful uncertainty in running an agency. Very few agency owners need convincing that recurring revenue relationships are an ideal target.

Focus on Recurring Revenue Growth: For recurring revenue businesses, most of your revenue growth comes after the initial sale.
(Source: forentrepreneurs.com/customer-success)



However, understanding the benefits of retainer relationships from a client perspective is of paramount importance.

Clients are frequently pushed into retainer conversations without proper time to establish trust and understanding. It is necessary to clearly communicate needs and expectations and to build confidence for both parties before most clients are willing to sign on the dotted line.

Why should a client want a retainer engagement?

Why does anyone want a committed relationship? Once we frame client relationships to be akin to real human relationships, this conversation makes a lot more sense.

A long-term relationship provides:

- Tangible benefits to both parties
- Dependability, consistency, trust and efficiency
- A rhythm of communication and workflow

Customer success is when clients achieve their desired outcome through their interactions with your company. – Lincoln Murphy

What sets client relationships apart from dating relationships, however, is that most of the time, the “retainer” conversation happens upfront. This eliminates the “dating” period during which the client and agency would normally get to know each other, build dependability and trust, and demonstrate mutual commitment to each other’s best interests. It’s generally a bad idea to ask a total stranger if they want to move in together based on a common interest of liking cats. Actually, that’s probably the recipe for a terrible reality show or a really good horror movie.

Fine, I get it. So how should I approach client relationships?

There is a plethora of very successful companies that have drastically different approaches to building client relationships. This isn’t to say that other approaches are wrong and ours is right – we’re just sharing what has worked well for us.

A discovery phase is often a good time to introduce the concept of marketing automation.

1. Define the key business problem that needs to be solved from the client's perspective.

Structure your engagement to deliver an outcome, not just billed hours.

2. Start with a small engagement to establish trust.

You can do this in a few simple ways. We normally start with a "discovery phase" to make sure that the client is committed to the process. This can be a road mapping process for a development relationship, a competitive audit or SWOT analysis for a lead generation or inbound engagement, or a brand positioning audit for a marketing retainer.

These are fixed-fee, fixed-timeline engagements that demonstrate to our clients that we are experts in our field, we can execute on time and on budget, and we will listen well to their needs and expectations.

This is often a good time to introduce the concept of marketing automation. Your clients can license a system on their own, so why should this be a service that you provide? As you manage the platform for them, you provide a value-added services and report on results.

3. Set the expectation that an ongoing relationship is the key to long-term success.

Most clients understand that today's competitive environment is

Create Higher
Value Relationships

Generate Monthly
Recurring Revenue

Prove Your Value
To Your Clients

incompatible with a "set it and forget it" mentality, but it's important to be on the same page about this from the beginning.

We rely on SharpSpring for both lead generation and engagement tracking to create a deeper, "stickier" relationship with clients where they rely on us for both the insights and results that a cohesive marketing automation platform provides.

4. Deliver results.

Once we finish the initial engagement, we start a three-month retainer trial to prove that we can deliver the outcome documented in Step 1.

Again, this is where a tool like SharpSpring becomes instrumental in creating alignment. We can provide quantifiable value by tracking the number of leads, opportunities and sales were able to influence without needing access to the client's CRM or accounting software. SharpSpring's advanced analytics and marketing attribution reports put the agency in the middle of the value conversation. These results can be delivered almost immediately from the beginning of the engagement.

5. If you communicate well, demonstrate expertise, and provide reasonable progress...

...the likelihood of the trial engagement turning into an auto-renewing annual retainer is very high.

I get it. This sounds too simple. It's true, building a happy, satisfied client base is a slightly more complex equation – but not by much.

What can I do to make the process easier?

Most agencies are willing to do anything they can to capture a client. But if we're being honest with ourselves, our agencies are a good fit for only a limited number of engagements. That means it becomes vital in the initial stages, for both the agency and the client, to set qualifying criteria and expectations for what makes a good working relationship.

These conversations should be frank, honest dialogues with the client. At 454 Creative, we are actually working on a scoring sheet that highlights some of the critical factors that we believe make a good working relationship.

B2B clients open up a lot more tools to play with, especially with SharpSpring.

- We love B2B clients. They open up a lot more tools for us to play with, especially with SharpSpring. For instance, VisitorID provides huge insights into site traffic which can help identify strategic opportunities. B2B clients also lend themselves to growing targeted lead lists and developing strategies for customer acquisition.
- Are we working with a marketing team or the CEO/owner? For us, working with a CEO/owner is a red flag in that it may indicate a lack of internal structure or integration for the marketing or lead generation function.

- Do they have a reasonable budget? Budget should be openly discussed since it relates to value. If a client needs to solve a $5K problem, the toolkit and resources needed will differ considerably from those needed for a $30K problem. Use of a value-priced platform like SharpSpring can allow us to put marketing automation tools to work for all clients, not just those with large budgets.
- Can they clearly articulate the business problem? Can we agree to success metrics that will make them happy? Can we deliver on it?

Once the trial engagement is kicked off, we go further by watching for red flags on the following:

- Are bills paid on time?
- Does the client value our expertise?
- Does the client have an internal culture of execution? Can they do “their part” once we deliver “our part”?
- Are they happy with the relationship? A simple “yes” or “no” goes a long way in creating alignment.

Learn to say no.

It’s counter-intuitive, but learn to say “no” often. The faster you can disqualify an opportunity or engagement that isn’t a great fit, the more time you’ll have to work on relationships that will be successful. The odds are stacked ten to one in favor of “no.”

We categorize our relationships into three groups:

Ideal Clients

Needs Nurturing

JTFM
(Just For The Money)

Some clients start as promising, ideal clients and quickly slip to nurturing or JFTM. You can keep a pulse on client engagement using marketing automation since it allows you to monitor your clients' activities/statuses. For instance, automatic notifications alert you to small changes in activity level that may grow into larger concerns. Even with this insight, sometimes it still doesn't work. The quicker you recognize the transition and act on it, the happier both parties will be.

Clients will outgrow you, and you will outgrow clients. Being able to recognize that transition when it happens is critical.

Clients will outgrow you, and you will outgrow clients. Being able to recognize that transition when it happens is critical.

Be completely honest with your clients about where they fit, and help them fix any issues preventing them from becoming ideal clients. If you must, help them to recognize that the engagement is no longer a good fit. Spend your best energy and time on building great relationships, not on nursing clients who don't fit well with your agency.

After all, relationships are about honest communication and a commitment to one another's well-being.

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Get a Demo

454 CREATIVE

454 Creative is a digital marketing agency in Orange County, California focused on building growth strategies for growing businesses and emerging brands. We value innovation, thoughtful design, and quality work. From crafting powerful e-commerce websites to helping companies use business intelligence to align sales and marketing, we are the engine that drives growth.

Visit www.454creative.com for more information.

Same Agency Services, More Revenue Streams

Bringing marketing automation
to a wider set of clients

About the Author

Chuck Bankoff is the Senior Strategist and Director of Web Services for Kreative Webworks, a full-service digital agency in Southern California. He directs a team of creative and technical professionals to develop lead generation strategies that integrate aspects of "site, search and social." He is a speaker, author and trainer of other Internet consultants on four continents.

I'm tired. I'm tired of competing on price instead of value. I'm tired of the feeling that I'm just one Google algorithmic change away from going out of business. SEO, PPC and website development used to be unique skillsets that would sustain a digital agency.

For most of my professional career in digital marketing, the focus has been on driving traffic to a website. That was the end game. We designed a great-looking, well-planned website, drove traffic to it, and crossed our fingers. We did our job; the rest was up to the client.

That was then, this is now. As the digital market grew more competitive, so did our clients. We could no longer point to keyword rankings and increased traffic and call it a day. Clients wanted higher and higher conversion rates, and they were relying on us to make it happen.

At first, it seemed like the only way to double results was to double traffic. The problem is that creating more traffic has its limits, it's expensive, and it just isn't the most efficient way to increase the bottom line.

A Concept So Simple, Even a CEO Could Understand It

If you focus on nurturing your current prospects, you can pretty easily increase your conversion rates by a couple of percentage points – which has a huge impact on your bottom line.

While it seems logical that driving more traffic to your site would result in more sales, statistically it's not as effective as converting your *existing* traffic.

Think about it this way: If you focus on nurturing your current prospects, you can pretty easily increase your conversion rates by a couple of percentage points – which has a *huge* impact on your bottom line. However, if your focus is on driving more traffic, you'll probably need tens of thousands of new visitors to achieve that same increase in conversion rates.

If you can convince your clients of this, you'll effectively turn the conversation into one about sales and conversions, not SEO and PPC. Congratulations, you've just separated yourself from your competition. Here is where you bring in marketing automation.

Making the Case to the Average Client

When it came to marketing automation services, larger companies could afford the ticket price that came with a HubSpot or a Marketo. They could afford our services *and* the platform fees.

The problem was with our smaller clients – our bread and butter. These clients universally enjoyed early results with our web services, but they

Out of every 10 prospects that should be employing lead nurturing and marketing automation techniques, maybe ***one*** *could afford the combined burden of HubSpot's platform costs and our management fees.*

were getting disenchanted with plateauing at a certain point. Eventually, even the best landing page will max out in terms of conversion rates.

Big brands with big budgets can afford to invest in expensive marketing automation platforms, but I had an ominous feeling that we were losing a lot of sales because the cost of entry at the HubSpot level priced us out of contention.

Out of every 10 prospects that should be employing lead nurturing and marketing automation techniques, maybe *one* could afford the combined burden of HubSpot's platform costs and our management fees. This meant that either I had to subsidize the HubSpot fees by lowering our own, or I had to abandon the lead nurturing strategy entirely.

Simply put, HubSpot is out of reach for the vast majority of my clients. It has many robust reporting features integrated into one tight platform, but that doesn't do me any good for my clients who can't afford it.

This is where SharpSpring comes in.

The Psychology of Pricing

When the platform fee is its own line item, it comes under scrutiny. And when that fee alone represents a significant portion of the client's overall budget, it may devalue their perception of your services.

For example, would you feel better about paying for a $20 shirt plus $10 shipping, or paying for a $30 shirt with free shipping? You're paying $30 in either case, but it's probably more comforting to feel that you just bought a $30 shirt – not a $20 shirt that cost you $30.

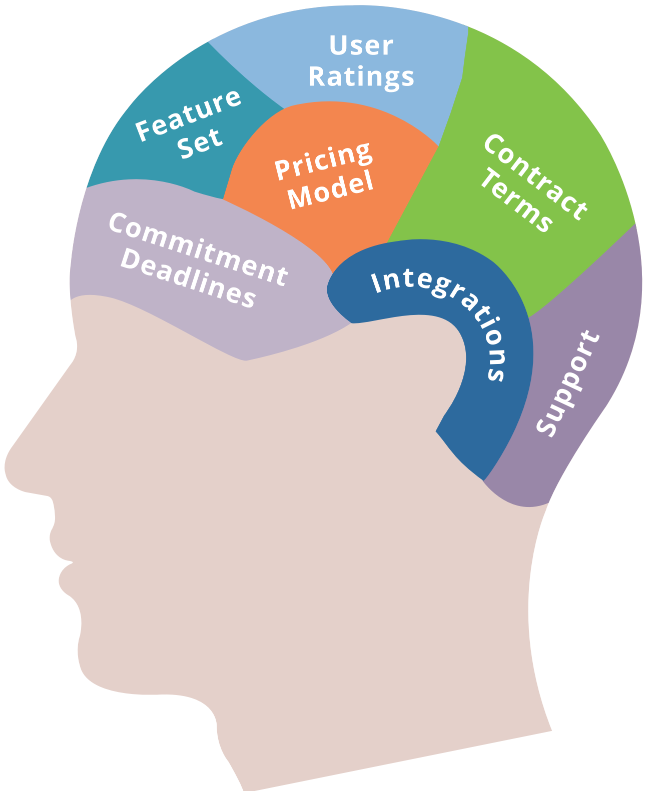
The lower price of the SharpSpring agency model allows me to absorb the platform cost into my retainer-based fees, so I can concentrate on selling services, not software. The cost of the software is no longer an obstacle.

The Reality of Pricing

*The affordable pricing of the SharpSpring agency model allows me to offer our lead nurturing services to an additional **three out of every 10** prospects that otherwise wouldn't be able to afford it.*

With SharpSpring, since I'm not paying a premium price for features most of my clients don't need, I can afford to offer lead nurturing and marketing automation to a broader array of clients. Why is this significant? While other agencies are competing on price for the basics (SEO, web design, PPC, Facebook, etc.), I can offer a full 360-degree package based on conversions, not just traffic. Sure, I'm going to charge more, but it's because I'm offering so much more for their money. That's money that's going into services, not software.

I estimate that the affordable pricing of the SharpSpring agency model allows me to offer our lead nurturing services to an additional three out of every 10 prospects that otherwise wouldn't be able to afford it.



Understanding how your prospects think is the key to successfully pitching your services.

The Monthly Advantage (more psychology stuff)

When a client knows they can terminate a contract on short notice, they're less likely to terminate abruptly. SharpSpring's monthly model allows me to pass that on to my clients. Knowing that they can get out of a contract after a reasonable amount of time serves as a psychological safety net, which is a selling point during the early stages of our relationship.

Conversely, when a client is locked into an annual contract, our fates become intertwined. At the end of a renewal period, I have to resell our agency services *and* the expensive software platform as separate line items.

I prefer not to put annual commitment deadlines in front of a client and force them into a yes/no decision. I'd rather leave the monthly option open to them without a deadline, because if they aren't pressured into making a decision, they usually won't (i.e., they'll stick around). And each month that goes by gives me more opportunity to add value and make my services even harder to live without.

Notes From the Field

If you want to make something seem like a great deal, put it next to something that isn't.

I make sure that I present both HubSpot and SharpSpring to my prospects, and then draw fair comparisons between the two. Then, I make a legitimate

recommendation based on the client's needs. In most cases (not all – sometimes money is not a factor), SharpSpring is the better choice.

In a recent deal I closed, the client (a large virtual charter school) was starting out with 57,000 contacts. The client was using MailChimp but wanted to upgrade to full marketing automation. Since HubSpot's starting fees are much more expensive, and it bills an additional $50/month for each increment of 1000 contacts, that would have been a deal breaker had HubSpot been my only choice.

As it turned out, using SharpSpring actually saved the client money. We were able to import all 57,000 clients into the platform, and they were able to drop their MailChimp account as a result. No-brainer...

Sell It With a Story

Don't assume that a prospect, no matter how sophisticated they may seem, can relate the concept of lead nurturing to how it applies to their particular business. Just like you might practice your "elevator pitch" for networking events, I practice a lead nurturing story.

Before the conversation with the prospect, I make sure that I understand their target market, so I can walk them through an actual strategy – from the lead magnet to the call to action. I even come up with potential titles for the lead magnet, such as: *"10 Reasons a Nurse Will Need a Doctor"*

Putting your pitch into a context the prospect is already familiar with will help them conceptualize the psychology of lead nurturing and the scalability of marketing automation.

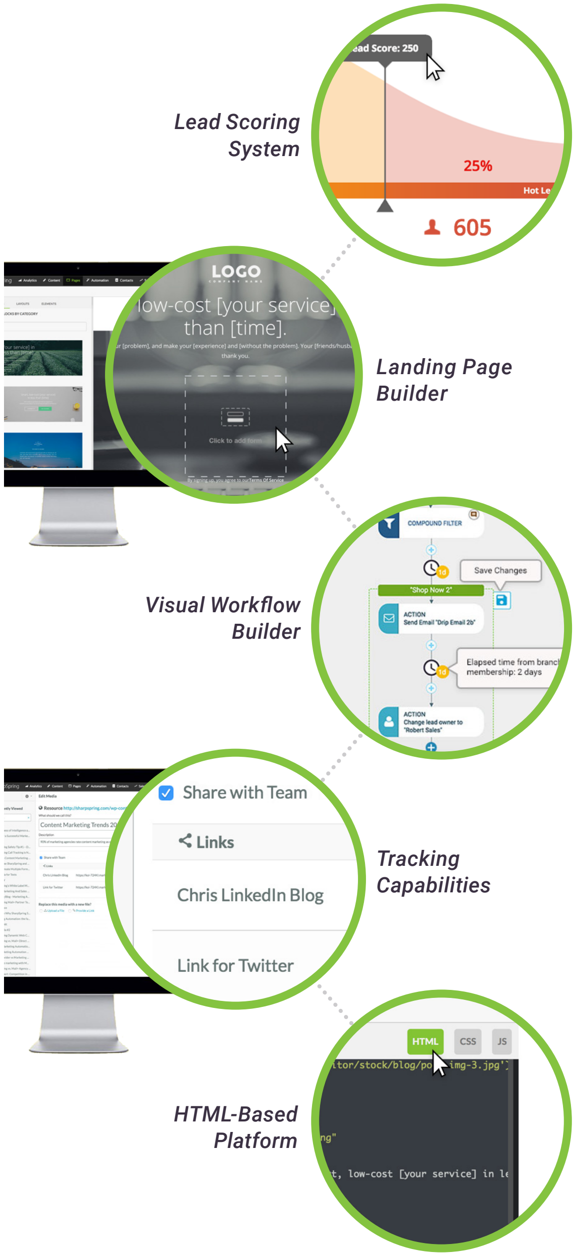
or *"10 Signs Your Child Is Being Bullied at School."* It needs to be something they can relate to, which will help move the conversation forward.

The more specific your pitch, the better. And don't worry, they won't be able to pull it off without you. The implication is that if you could come up with those concepts off the top of your head, imagine what you could do if they were your actual clients! More importantly, putting your pitch into a context the prospect is already familiar with will help them conceptualize the psychology of lead nurturing and the scalability of marketing automation.

Notes From My Staff

My staff and I were both introduced to the finer points of marketing automation through HubSpot. They have some great self-service tutorials. I'm actually a big fan, but their prices are untenable in many cases. They have a terrific all-in-one solution, but there are few things they offer (aside from the convenience of integration) that can't be made up with specialized third-party software like SEMrush.

For my part, I'm less concerned with the nuts n' bolts of SharpSpring vs. HubSpot than I am with strategy and my ability to sell our services. My staff, however, uses both platforms on a regular basis, so I polled them as to what they think about the differences between HubSpot and SharpSpring. It turns out they prefer working with SharpSpring than with HubSpot.



Here's what my staff says about the differences between SharpSpring and HubSpot:

- **Lead Scoring System:** Really user-friendly and gives you limitless options to place value on the leads you want. It's easier to visualize and score all the different actions a lead goes through on their buyer's journey. It gives you a total snapshot of everything, whereas HubSpot's system seems a bit fragmented.

- **Landing Page Builder:** Again, easy to use, *and* it also offers more options than HubSpot. The dynamic content feature is also great for personalizing landing pages based on personas.

- **Visual Workflow Builder:** SharpSpring offers a clean format and lets you see the entire workflow without having to scroll or search for individual components of the workflow.

- **Tracking:** SharpSpring gives you a unique tracking code for each piece of media you use. Makes it easier to lead score based on media views, but also tells which media is performing the best.

- **HTML-Based:** With SharpSpring, you don't have to learn another coding language. With HubSpot, you must learn their proprietary coding language called HubL (pronounced "Hubble") to make customizations.

A Great Platform at a Great Price

Here's the deal, if you embrace the concepts of lead nurturing and marketing automation, don't let the software get in your way. SharpSpring is not an inferior product because it's a fraction of the cost of the expensive platforms. Rather, it's a focused product that is priced accordingly to bring lead nurturing and marketing automation to the masses.

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Founded in 1999, Kreative Webworks is a full-service digital marketing agency based in Capistrano Beach, California, currently specializing in the education sector. The agency provides integrated strategies and manages their execution, including website development, SEO, content marketing, paid advertising and lead nurturing.

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For more tips on how to grow your agency, check out:

SharpSpring's Go-To Guide for Landing Pages

The Top 10 "Must-Haves" for Marketing Automation

Infographic: Improve Your ROI with Video Content Marketing

SharpSpring is the marketing automation platform of choice for more than 1,400 digital marketing agencies and their 6,000+ clients. Since 2014, SharpSpring has provided its powerful marketing automation solution to businesses around the globe. In the short time since its inception, the company has gained significant market share from industry leaders with its competitive pricing, agency-focused business model, and robust platform.