PROCESS

A 90-Day Implementation Guide to Help You
Create Your End-to-End Process

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OVERVIEW

When it comes to marketing and sales, there's no better way to engage your prospects than through a clear end-to-end process that converts.

To establish Strategic Alignment, you need to focus on positioning, process, tools, and metrics. This 90-day guide is centered on process and has been created to help you roll out your revised strategy.

It doesn't matter if you are a team of one, ten, or ten thousand, you need to have a tight process from the time a prospect first engages with you to the time they sign the dotted line.

There are three keys that help you develop or update your end-to-end engagement process:

Key 1 – Relevant Funnel Breakdown
Key 2 – Traceable Progressive Steps
Key 3 – Intentional Touch Points

With these keys, you will be equipped to create a framework for you to measure and achieve your marketing and sales goals.

As a reminder, this material can be applied at multiple different levels, such as the organizational or departmental level. It can also be applied to a specific campaign, product launch, or other related marketing and sales initiative. For this area, we focus on application in the organizational level.

This guide will help you navigate how to solidify and update a streamlined process as you continue to develop your marketing and sales strategy.

If you do not take the time to implement your end-to-end strategy, you will miss opportunities. They might slip through a crack or your team might not be operating in a capacity to handle them. Either way, a strong process will streamline your funnel end-to-end and ensure nothing gets lost in between.

1 KEY ONE

The first key to developing your end-to-end engagement process is specifying your funnel breakdown.

If you or your team doesn't have an understanding of where the lines are, then accountability for success becomes equally blurry. There are three main elements that need to be defined when specifying your funnel breakdown: stages, sources, and ownership.

Element 1: Stages. To begin developing your end-to-end engagement process, you need to define the stages of your target audience's lifecycle. That means not only providing nomenclature around them but also articulating what that means for your business. Stages allow us to prioritize our marketing and sales efforts in a way that sets us up for success.

Element 2: Sources. Your prospects can come from two different sources, inbound and outbound. Within each source, there are a variety of channels. For example, social media, events, press, advertising, and email. For many businesses, the different stages might have one or two sources, and those sources may vary across the funnel. It's important to remember that these sources specifically can change as you gain greater market recognition.

Element 3: Ownership. Ownership must still be clearly defined in order to achieve goals. Ownership can be assigned at the individual, team, or departmental level depending on the size of your organization. Owners are ultimately responsible for their respective funnel segment goals, but the entire team works together to achieve them.

First, define the stages that are important to the lifecycle of your potential customers.

Next, walk through each stage and write, inbound, outbound, or both.

Then, assign each stage of your funnel to an owner. Avoid multiple owners as that can create confusion on who is taking the lead.

Stage & Description	Source	Owner

2 KEY TWO

The second key to developing your end-to-end engagement process is establishing traceable progressive steps.

Without traceable progressive steps, you will have major data gaps, whether that's having a highly-trafficked blog that's not producing leads or a highly converting lead form that isn't notifying anyone automatically for effective follow-up. If you or your team don't have these in place, you will lose opportunities. That's easy enough to see. There are two main elements that need to be considered when establishing traceable progressive steps: qualification criteria and conversion tactics.

Element 1: Qualification criteria. Collecting this information is a major component of moving a prospect down the funnel. For the top of the funnel, whatever your stages may be, qualification criteria is a little more broad – typically something that can be collected in a form. As you move down the funnel, qualification criteria get more specific and need to be specific in order to optimize your marketing and sales cycle.

Element 2: Conversion tactics. Where the qualification criteria is the bridge between the stages, conversion tactics are the force that propels a prospect from one stage to the next. Another term for conversion tactics is campaigns. Tracking the success of these campaigns is important to knowing where to focus and when to pivot.

Add on to your definition of each stage. Include Objective, Conversion Tactics, and Qualification Criteria at a minimum. Articulate the advancement process and add an estimate for the average time in stage if you have it.

Stage In Detail	Advancement Process	Time In Stage

Note: You can start to build your own Strategic Alignment Guide – a place where you can formally document your positioning and make it available to your entire team. Use your answers here to complete **"Funnel Terminology"** and **"Engagement Strategy"** in the Positioning Document Template.

3 KEY THREE

The third key to developing your end-to-end engagement process is implementing intentional touch points.

These work in tandem with the conversion points but are the little extra incentive needed to get your prospect moving quicker. You want to systematically incorporate intentional touch points that will support the traceable progressive steps of your relevant funnel breakdown. There are two elements of implementing intentional touch points: purposeful content and timely follow-up.

Element 1: Purposeful content. We are firm believers in content marketing which drives inbound leads that go through different levels of self-qualification. A strong content marketing plan needs to be part of your end-to-end engagement strategy. Each piece of content needs to have a purpose, whether that's just to remind prospects you are there, to provide thought-leadership from a variety of sources, or to educate them on a very technical portion of your offering.

Element 2: Timely follow-up. Everything you have worked on can quickly go to waste if your prospects, who convert to possible opportunities, aren't followed-up on in a timely manner. you have a short window of time to follow-up and capture the attention of your prospective customer otherwise they might make another decision or forget about you. Based on the nature of your business, especially if it's business to consumer or business to business, you should tweak the combination of email, phone calls, and social outreach used to engage the individual.

CURRENT CONTENT LIBRARY

Take inventory of your existing content library. What kind of content does it include? What medium or weight is most common?

REIMAGINED CONTENT LIBRARY

Reimagine what a balanced content library would look like for your organization (in weight and in medium). Consider what would be most effective to present to your audience and how you can vary content.

Note: Begin drafting a content marketing calendar for the next three months using the Content Marketing Template. You can complete the Positioning Document Template and add this to your content marketing calendar in the Strategic Alignment Guide.

As part of establishing timely follow-up, create a list of lead sources from the previous conversion tactics exercise that need follow-up.

Lead Source	Lead Notes

Note: Once the above list is completed, pick a high priority conversion source and build a cadence with follow-up emails, phone scripts, and social messages using the Cadence Template. You can complete the Positioning Document Template and add this to the enablement tools section of the Strategic Alignment Guide.

NEXT STEPS

- [ ] Share your process document draft with all involved in marketing and sales
- [ ] Get feedback, refine, and publish the first portion of your process document internally; you will add more to this in the next two modules
- [ ] Begin new testing conversion tactics
- [ ] Build out cadences for all follow-up items listed
- [ ] Execute the first three months of your content marketing calendar
- [ ] Update any standard operating procedures or related tools to reflect marketing and sales process changes
- [ ] Consider what success looks like and what tools you can use for efficiency

Congratulations on completing your second module and implementation guide. You are on your way to synchronizing your marketing and sales efforts in such a way that you can scale your business without hassle. See you soon for your module on tools!