

## The EMBRYO PHASE

You think your sales and marketing operation right now might be in the **EMBRYO PHASE**? **Let's see what to do.**

The **EMBRYO** phase is characterized by **low efficiency in sales and marketing**. Don't panic, the good news is that with only a little practical help you can grow quickly from here. Embryos develop into cute babies 😊.

You might have an awesome product or a motivated team, but this stage means you are not well organized and there is a clear **lack of processes and systems**. In this stage, there is only the potential of life, not really a highly functioning reality. People might call it an “entrepreneurial environment”, which is just a politically correct way to say, “only the boss knows what the hell is going on here”.

At the start-up stage of the life cycle, **it is a natural development** of the sales and marketing operation to be in the Embryo phase, but it is a good indicator that you will need to organize yourself, your team and your business to create an efficient infrastructure for growth.

If you started your business in a market where there was a general lack of competition, you could have achieved success even with an operation that has little or no sales and marketing competencies. **That is a desirable, but rare set-up. Congratulations on having a business and wanting to grow. Seriously.**

Based on your responses I have a few **suggestions on how to grow** out of this phase and enter in the Happy Baby phase (the next one is the Crazy Teenager then the Legal to Drink Phase .. just saying).

### **WHAT TO DO:**

Do not panic, as I said, embryos develop into cute babies. Have a cup of tea and maybe find a good mentor to help you examine all the building blocks of your marketing and sales operation.

While you are doing that, I have a **few projects that you could start with to build a structure** around your business. Building an efficient structure is not brain surgery, but you need an easy step by step guide and a good understanding of what you really need.

For starters here is a shortlist of projects that will bring you value:

**Establish your Lead to Cash Process**

**Optimize your Lead Management**

**Create a yearly, fun Promotional Calendar**

Create a Performance Management System

Establish a flexible Client Management System

Define your Customer Profile

Brand your entire Customer Experience

Introduce Individual Coaching program for yourself and your people

I know this seems a lot at first glance; therefore, I **suggest that you focus on the first three projects:**

**Establish your Lead to Cash Process**

## **Optimize your Lead Management**

### **Create a yearly, fun Promotional Calendar**

Let me give you some a practical approach to them:

**The Lead to Cash Process maps out the detailed itinerary of the customer journey throughout the buying process.**

If you are not familiar with the word “lead”, **lead means to have the contact information of someone that COULD become your customer.**

If, for example, you are selling kids bikes, a great list of leads would be the email addresses of parents of kids between 5 and 9 years old. Or if you are selling security systems, leads could be the list of emails of every person that this year is building a house in the area that your business operates.

The **Lead to Cash process will help you see your entire sales and marketing operation, but mostly from a client perspective.** You will start with where your lead might hear from you, then what happens after the first contact until the sale happens.

**To map out your Lead to Cash Process, take a bunch of colorful post-it notes and on a big wall to start tracing each step** of your customer from the moment that it is just a lead to the moment they become a client. **The trick is to write down the responsible, the timeframe that they will finish that step and use different colors to make a difference between email, phone, automated or in person contact with the customer.**

I suggest you get **the help of an outsider** that already has done this before because they will ask the right questions and make sure you follow every single step. If you cannot find anyone to lead this process, do it yourself with 3-4 members of your team. Just jump into it, I promise it will be not only fun, but your best trick ever.

**You will be amazed** that in one single hour how many ideas you will have to optimize your entire sales process. I have done this at many companies and, trust me, **it is every company's secret weapon.**

Whether at Nestle, a small boutique IT company, mid-sized company dealing with laboratory equipment they all had **“AHA moments”** going through this process.

**Do this periodically** - I would suggest around 8 months - and always have a clear action plan and deadlines after the mapping for the changes that you want to see implemented.

**Lead Management is about generating qualified leads for your sales pipeline.**

Again, just in case, **lead means to have the contact information of someone that COULD become your customer.** Remember the examples before? If, for example, you are selling chocolate a list of people that are getting married can be a great pool of leads – those are the guys that need reminders and chocolate every year from now 😊.

There are 3 important tricks to remember regarding leads:

**Not every lead is a quality lead** - this means that you might have 10.000 email addresses from Kiev, Ukraine, but if you operate a small, local bead shop in Toronto, Canada... well, let's just say they are not qualified leads. These good Ukrainian people will not

boost your Canadian sales. This is a valid point even if you get local people on your list, who never had the intention of buying beads. They are not qualified either. A Potential lead is someone's contact information that is a POTENTIAL customer for your business.

**You need to own your list of leads** - having a Facebook page with 10,000 followers doesn't mean you have a lead management system. It means that your customer or lead list is owned by Facebook, and if Facebook changes its algorithm tomorrow (which is a big possibility), you might lose all your contacts. Having social media followers is great, but unless you export their contact info in your own system, you risk losing the entire thing.

**Automated lead management is the thing you need** - there are great solutions out there (ones that even small companies can afford) that allow you to gather and contact your leads with an automated solution. You don't need to send manually 1000 emails a day, you don't need to make 1500 phone calls per day - there are solutions to optimize all this work, so you can sit with a cup of coffee and dream big.

*And now the best trick* (this trick has its own paragraph): Your **best leads are your actual, happy customers**. A satisfied client that has already done business with you is priceless. These people trust you, have already tried your product and services so they might give you more business or recommend you to your next customers.

**What I suggest you do is book an hour every week to think about your leads**, about how you can contact them and how you can bring them value. You can focus on the list above: how to better qualify your leads, what system to use to own your lead list, how to automate your lead capturing and communication process, and how to generate more leads from your actual client list.

I know it sounds weird, and you might end up sitting and not having a single idea but trust this routine, you will train your mind to focus on this problem. **The more routinely you think of your lead management, the more ideas you will come up** with to implement, and that will definitely boost the efficiency of your operation.

More structured focus you have on your lead management, the easier you will work with outsider: consultants, agencies, because it will be clear **what You want for your business**. And a client that knows what she/he wants is the best client to work with ;)

**A Yearly Promotional Calendar is a list of specific promotional activities that have a goal to increase leads and sales.**

I would like to urge you not to think of promotions, but for **a longer period to experiment with new ideas to build fun and value for your customers**.

Setting a yearly promotional calendar is a no-brainer. **Setting a yearly FUN promotional calendar requires a little more effort. Think bigger.** Always bigger and more fun.

My general tip for fun is that **if I don't think it is fun, then the customer won't like it either**. So, have fun with it. Give a few hours for a small team to come up with a few fun ideas on how to promote your products and services.

After you have the ideas, here is a short checklist to follow:

**Make sure you establish the goal** - and I mean a business goal. To “educate the customer” is not a goal. It sounds like a goal; it looks like a goal, but it is not a goal. The goal is specific and measurable, like I want to sell x amount from this product.

**Set the WHY** – you want your customers to change their behavior, so ask yourself: “why would they do it?” ... Maybe ask yourself if YOU would change your daily routine, your behavior for this prize?

**Set a specific time frame** - you need time for people to grasp the idea that you are promoting something. So, unless you want a 24 hour flash sale, give a little breathing room for your idea.

**Create a way to measure the results.** - Without metrics, don't even start. Seriously. Every promotion should be measured. If it cannot be measured, it is not a promotion. I mean, determine the success in numbers and then measure it, so you can evaluate your ideas at the end.

**The most important rule is to have fun with it.** Create excitement and joy. Let's all agree that this world needs more excitement and fun.

For more case studies and a return on investment template, check out my individual coaching program or the online course on How to Create Efficient Promotions.

#### **WHAT TO EXPECT if you implement some of these projects:**

**Expect the structure.** The structure is good.

**At this stage, you will have quick results, by doing just a few things.** You will be surprised how easy it is to build a better interface with your market if you start creating only a few simple processes.

**Expect a bit of skepticism. Even from yourself.** We are not all fans of processes and metrics but give it a try. Trust me, a little organization did not hurt anyone. Just make sure everything you create makes sense to you and your team.

In the case of the **Lead to Cash process**, you will be spotting some non-value-added steps that you might cut out or even reconsider some business value-added steps to optimize while they are not adding customer value. You might see parts of the process that bring real value to your customers, and you might focus on those parts in your next brainstorming session.

Your **Lead Management** will focus all your energy on the right direction – we all know there are only 24 hours a day, so let's not waste them.

Your **Yearly Promotional Calendar** will quickly increase your client focus and start making your money.

Here is an approximate timeline to implement these three projects based on my experience:

Projects	Set- up Time	Implementation and Evaluation



Lead to Cash Process	Max 3 hours process mapping	2-3 months
Lead Management	1-2 weeks	1-2 months
Yearly Promotional Calendar	1 day	Depending on the resources, a fixed number of allocated hours per month

In my online course, at the Alternative School of Business, I dig deeper into each of these aspects of the sales and marketing operations with case studies, examples, and a more visual way to implement them with an easy step by step process.

Have fun growing,

Katalin