DRIVE
CREATIVE AGENCY

HOW TO USE AUTOMATION TO INCREASE SALES AND EFFICIENCIES WITHOUT HIRING ADDITIONAL SALES STAFF

Keap Marketing Automation Topics We Will Be Covering in This eBook

Tagging

Campaign Builder

Zapier Integrations

Ecommerce

Lead Management

Reporting

QUICK NOTE

Hey there! By downloading this eBook you've already taken the first step in using automation to scale your sales and marketing. While there will be a lot of work ahead, it's our goal to help declutter this nebulous topic and focus on the core benefits, advantages, and strategies to effectively use automation to improve and scale your sales and marketing. We hope you find it helpful!

What is Marketing Automation?

Marketing automation is a software that can progress prospects down your marketing funnel without the need of a human being taking action.

The automation software we are referencing in this eBook is Keap since this is the software we use to help our clients get the most out of their marketing campaigns at Drive Creative Agency.

Keap (formerly known as Infusionsoft) is a CRM, Sales & Marketing Automation platform. It has a low cost entry point with a scalable pricing model, and an extreme amount of customizations that truly allow you to personalize the platform around your current marketing and business processes. Keap can run alongside your current ERP or traditional CRM with ease. It's an open source API allowing you to integrate the software itself with other systems. If needed, Keap can be a replacement for your current CRM/sales system.

There are many ways that Keap helps you automate your sales process and take the pressure off your sales team on a daily basis. In this eBook we are going to go through the ways Keap helps, that we consider to be the most valuable to you.


248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com
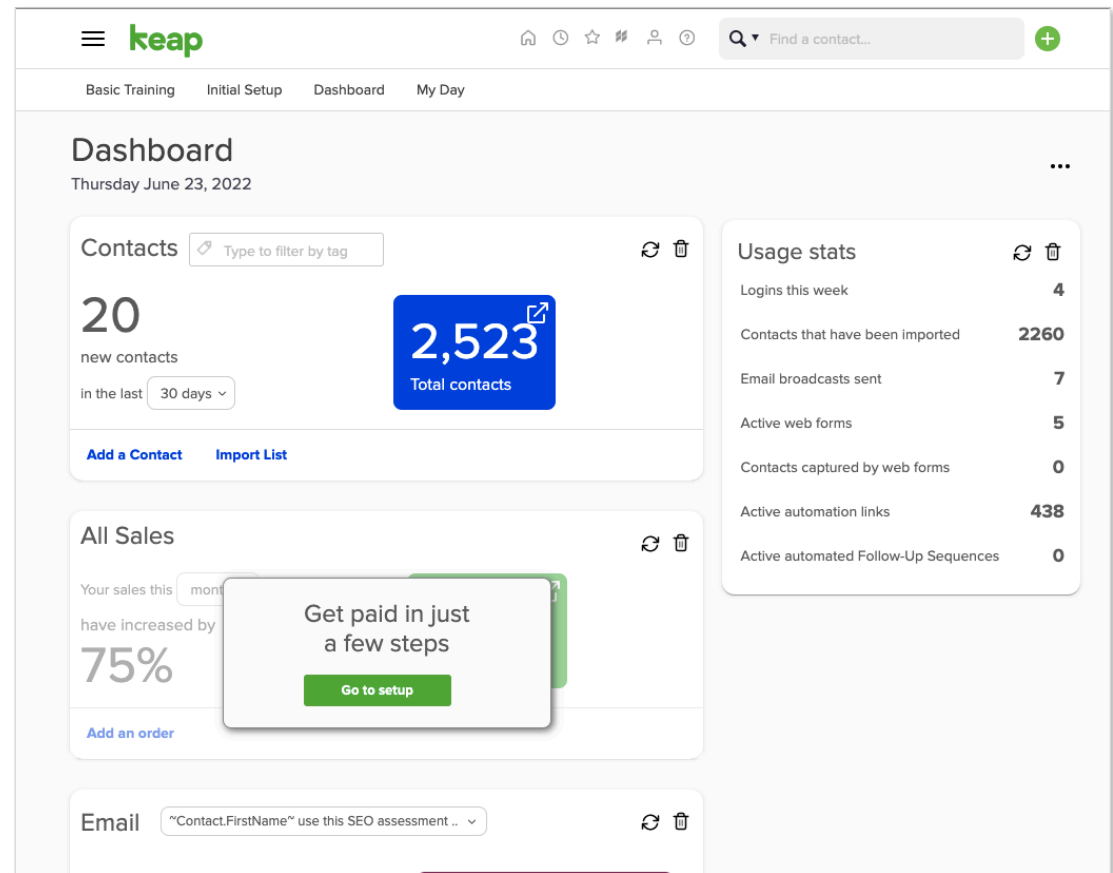
Section 1 "Tagging"

Tagging is the most important aspect of keeping your contact list organized. It holds three purposes. The primary purpose being segmenting your list, and the other two being functional triggers (start or stop automation) and to report (strategically apply & remove tags to create custom reports). The beauty of tagging is that it describes the relationship between your business and individual customers by informing you of the behaviors they have taken with your business.
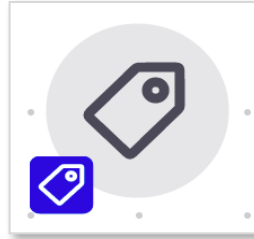
Thanks to this, you can group contacts together who have something in common and market to them in the way you feel you should for where they are within your sales process at a given time.

For example, if you had a tagging system that tagged users who filled out their information on your website to find out more about a specific product you offer. This tag could alert not only a campaign to start where they receive information about that product but also alert one of your sales people about this user and their interests. From here, the salesperson would have more time to reach out to them because they would be receiving consistent automated communication from your campaign and then when the sales person reaches out they will have a lot more information on the users interest and actions so far with your company. With this information, the sales person will have a better understanding of how to approach this user based on their actions so far. This will really help to ensure that your sales team are able to make each interaction with your customers individualized to their needs.

Now that you can see how important tagging is to ensure you are marketing to your contacts in the correct manner and at the correct time, we suggest taking the time to build a strategy for how you are going to tag your contacts.

Building Out a Tagging Category Strategy

Tag categories help you segment out specific tag types and keep your entire CRM more organized. There are multiple different tag categories, **but the ones we feel are the most valuable are:**

☆ **PROSPECT:** These are the customers who you feel are interested in your business but have not taken actions to show that just yet. You can create multiple different prospect categories to better organize your contact list if you feel necessary, as well as having the ability to create "hot & cold" prospects allows you to gain an understanding of which prospects are most interested in what you are offering and which ones are not.

Apply a Tag		
No Category:	Please select a tag ⌄	Apply this Tag
Behavior:	Please select a tag ⌄	Apply this Tag
Client Tags:	Please select a tag ⌄	Apply this Tag
Nurture Tags:	Please select a tag ⌄	Apply this Tag
Prospect Tags:	Please select a tag ⌄	Apply this Tag
Vendor:	Please select a tag ⌄	Apply this Tag

248.579.9972

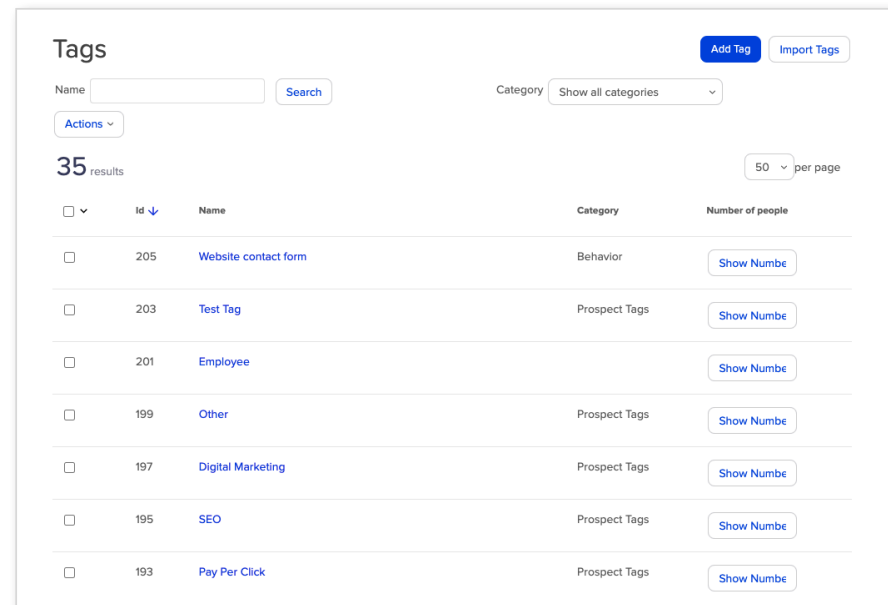425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com

☆ **BEHAVIOR:** These are customers who have taken an action with your business and therefore display a behavior. For example, if you had a campaign with the end goal being for a user to schedule an appointment with one of your sales reps, when they click on the schedule link they would be tagged as "clicked schedule link". Once they actually scheduled the meeting they would be tagged as "scheduled sales rep meeting". Essentially, you are able to create tags for each step in a campaign you build to determine how interested a user is based on their behaviors, hence the category being named "Behavior".

☆ **CUSTOMER:** These are similar to prospect tags but for people who have made purchases with you. You can label these tags in order to show you which customers have bought which products or you could create 'repeat buyer' tags to show you your most loyal customers who consistently make purchases.

☆ **TRIGGER:** These are action oriented tags that allow your customers to opt in or out of your campaigns, and from there you can create tags to start or stop your campaigns going out to these customers.

Once you choose your categories, the actual tag names you choose will be determined by you based on the individual contact and when being tagged in a campaign - the campaign name and what point of the campaign they are in.

Creating, Managing, and Deleting Tags

You can create tags on the fly from different pages of Keap. However, generally you will go to the CRM settings page > on the left hand side you will see 'tags' and 'tag categories'. Click on 'tags' and from this page you can edit your current tags as well as create new ones. When you are creating new ones, choose the category you want the tag to be in and click 'add tags'. A little pro tip for you; you can create multiple tags at once by separating the names by commas!

When it comes to both creating your tags and editing them, there are a few things you need to ask yourself to ensure your tagging strategy is working efficiently. One, make sure all your tags hold meaningful information. Two, don't have redundant tags. And three, don't have tags that are essentially doing the same thing.

Tags

	Id ↓	Name	Category	Number of people
☐	205	Website contact form	Behavior	Show Numbe
☐	203	Test Tag	Prospect Tags	Show Numbe
☐	201	Employee		Show Numbe
☐	199	Other	Prospect Tags	Show Numbe
☐	197	Digital Marketing	Prospect Tags	Show Numbe
☐	195	SEO	Prospect Tags	Show Numbe
☐	193	Pay Per Click	Prospect Tags	Show Numbe

Name [ ] Search   Category [Show all categories]

Actions

35 results   [50] per page

Add Tag   Import Tags

Side note; (but an important one) if down the road you find yourself in a place where your tags are potentially becoming redundant or too messy you can delete them. To do this, select the tag you want to delete > click the 'actions' drop down in the top left and click 'delete'. From here, you can also do other things such as move your tags to a specific category.

Applying & Removing Tags

You can apply and remove tags either manually or through automation within the campaign builder which we will talk about in the next section! But for now, if you want to apply or remove tags manually to an individual or a group this is how you would do it:

☆ **INDIVIDUAL**: Search for the user you want to apply a tag to and click on their name. On the top row, click on 'tag'. From here you can both remove and apply tags.

☆ **GROUP:** To apply/remove tags from a specific group of contacts, go to the 'view contacts' page and select your group of contacts. Click on the 'actions' drop down and select 'apply/ remove tag' - this will allow you to do this for the whole group of contacts you have selected in one fell swoop. Time saver!

Id	Edit	Name	Numtags	Delete
1	[Edit]	Client Tags	2	[Delete]
4	[Edit]	Prospect Tags	20	[Delete]
10	[Edit]	Nurture Tags	5	[Delete]
15	[Edit]	Vendor	1	[Delete]
19	[Edit]	Behavior	5	[Delete]

5 results   Add Tag Category   20 per page

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com

Section 2 "Campaign Builder"

HOW TO USE AUTOMATION TO INCREASE SALES & EFFICIENCIES

The **Campaign Builder** is the most powerful tool Keap offers to your business. When used properly it can save your sales team a ton of time on administrative tasks, and your business a ton of money by stopping the need for you to hire additional sales staff as you scale. Put simply, the campaign builder is an automation engine that allows you to dictate when and how you speak to your specific contacts.

When planning your campaigns, you need to ask yourself what your objectives are for them and how your users will meet those objectives. Your objectives are called your 'goal icons' within the campaign builder and the steps your users will need to take are called your 'sequence icons'. For visual reference, goals icons are round and the sequence icon is a rectangle.

Your goals are quite obvious once you know your plan, however your sequences need to be thought out. These are areas your users could drop off before they hit the next milestone, therefore you need to ensure your building bridges within which automation is consistently keeping your customers interested no matter how many times they may drop off the bridge.

Goal icons hold two purposes, they start what comes after them and stop what comes before them. They are your triggers or actions that need to take place in order for the automation to begin. These could include a tag being applied, a user submitting a web form, clicking a link, making a purchase etc… They also stop the sequence that comes before them, meaning once a user achieves a goal they are automatically taken into the next sequence and will not receive any of the communications from the sequence preceding it. This means that you are not overloading your users with unnecessary communications and they are being rewarded for taking the action to achieve a goal in your campaign.

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com
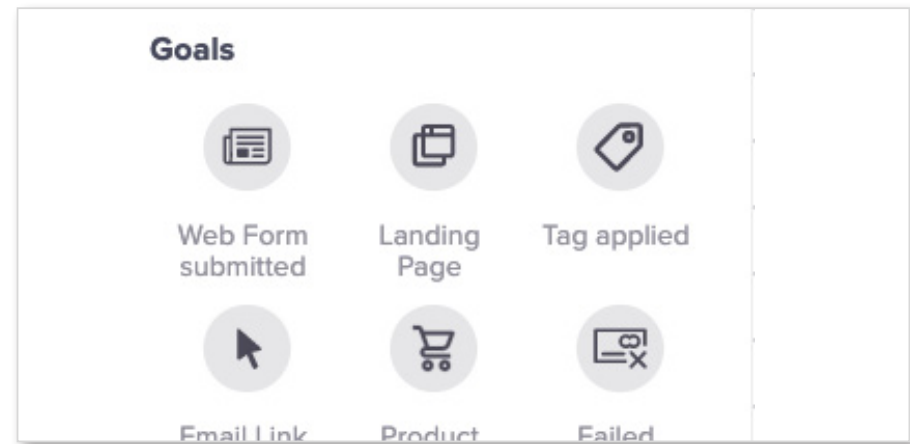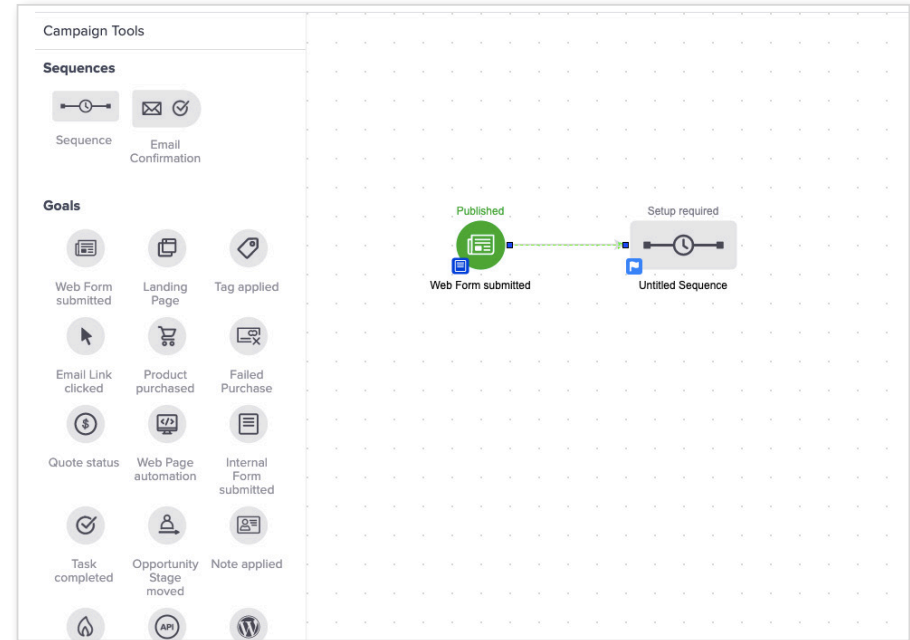
Your sequences are the automation response to a user achieving the goal proceeding it - these could include an email being delivered to them every other day for 2 weeks or an alert being sent out to your sales staff that a customer is interested in a call.

Sequences

Sequence Email Confirmation
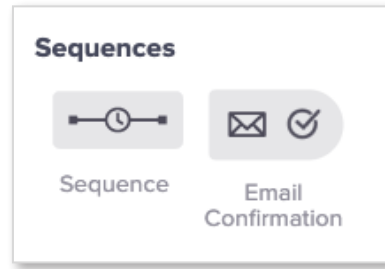
There are three types of automation: customer facing, internal and combined internal & external automation. Let's go through what each of these are a little more:

Customer Facing

These are delivering something to the customer which is often determined by an action they took. This type of automation really lowers the workload for your sales staff and allows them to mimic what they would do manually using automation.

Example: If a customer takes initiative with your company by filling in their information into a landing page, the automation that follows to connect with them and understand their needs better (such as emails) would be considered customer facing.

Internal Automation

As you have probably guessed, this is not customer facing at all and is used within your team. They are designed to make life easier for your sales staff by creating reminders for them, notifying them of leads or even going as far as scheduling appointments for them.

This can also be a great tool to better your company culture. For example, if your business has a program where you vote for employee of the month for example, you could create a campaign to automate that process.

Combined Internal & External Automation

This is what we call a drip campaign, which if you ask us is one of the most valuable parts of using automation. You probably have hundreds of leads that at one point were incredibly interested in what you offer and probably still are but they have fallen through the cracks because your sales staff are overloaded. This is where drip campaigns come in. You can tag your leads as 'prospects hot' or 'prospect cold' (or even individualize them to the specific product they are interested in and create campaigns for each, if you know that information).

Example: If a prospect of yours suddenly goes dark on you. You could enter them into your nurture drip campaign, which would consistently keep you in front of them through automated emails. This way you are ensuring that the trail never stops but with no work from your sales team.

Create a campaign that begins with a tag being applied that over time continues to deliver constant communication to your contacts which keeps their interest high. It also allows you to monitor their actions and gain an understanding of what they are most interested in. These drip campaigns ensure that leads are never falling through the cracks, and when one of them requests a phone call with a sales person (for example) the conversation won't be starting from square one. This works hand in hand with your sales team to create the best customer experience possible while also creating an easier and less pressured process for your sales people.

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com

Building a Campaign

Building your campaigns is where the fun starts! This is where you are able to bring your vision to life and build it exactly the way you want to. Essentially, your campaign is your marketing. This is where the automation is built, lives, breathes and finally works for you. Depending on your focus, you can build campaigns with different visions in terms of clients. For example, one campaign can be built for current clients who are in the midst of working with your company. You could have another one which is more of a drip campaign for those customers who have done work with you before but you haven't heard from in a while. Or, you could build a lead magnet campaign centered around marketing and engaging potential clients. However and whoever it is you want to market to, you can do all of this within the campaign builder. Every campaign can have a voice of its own to make your customer experience more personalized than you ever knew was possible.

The campaign builder is a drag and drop system so it's very easy to use. The first thing you will need to do is name your campaign. Make sure you name every campaign something very obvious so you know exactly what each campaign is being used for. You can then choose which type of campaign it is (lead gen, sales, client nurture etc...) and you can add it to multiple categories if you feel that it may fit a few.

Once you have your campaign named and have decided the type of campaign it will be, you will need to think about the high level goals for it. Once you know the goals you want to achieve just simply drag and drop them to the board. To create them, simply double click on them and it will take you to the edit building screen for each goal. As mentioned above the goals are the round icons that you see on the left hand side and these vary from something as simple as submitting

a web form all the way to a product being purchased. Your campaigns will always begin and end with a goal and you may have just two or you may have up to 50 depending on what the campaign's aim is. For example, if it is something as simple as wanting a customer to click an email link, there may only be a couple of goals in between achieving that. However, if you are building a drip campaign with the final goal being a user scheduling a call with a sales person, you may want many more goals in between in order to keep the user interested and for you to see what they are and are not achieving to determine those interests.

Once you have chosen your goals and dropped them onto your canvas, you will now input sequences between each. Like we said, these are the bridges that connect your goals and help you stay in front of your users so they don't drop off the grid between goals. As mentioned, your sequence is the rectangular icon in the top left of the icon board. Here's a must do for you: you have to be sure that you are connecting your goals and sequences by dragging the green arrow to each. If you don't, no automation will occur.
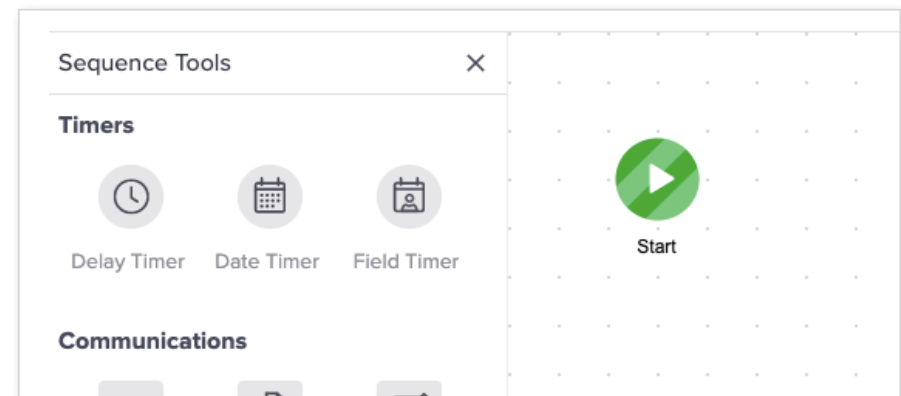
When building your sequences, you need to decide how many points of contact there needs to be with a user before you think they will

achieve the following goal. To edit your sequences, double click on the icon and you will be taken to the sequence builder page. From here, again it is simply a drag and drop system where you can choose what type of contact you want there to be with the communication icons (email, text, letter, fax etc…) and how long between each communication with the timer icons (again to edit each of these, just simple double click on them). A lot of times you will most likely only be using the email icon for communication. However, under your communication icons, you have your process icons. These are other steps that can occur within your sequence and in these you have multiple options. Let's look into the ones we consider to be most valuable:

☆ **APPLY NOTE:** This allows you to apply a note to a contact at a certain point in the sequence. Much like tagging, it simply is a way for you to keep track of exactly what a contact has done with your business up to this point. Notes just allow you to make it a little more detailed. It is also important to add these into your sequences because tags can be removed from contacts, however notes will always stay in a contact's details and will leave a historical trail of a user's behaviors.

☆ **APPLY/REMOVE TAG:** We spoke about tagging in the first section of this eBook but this just allows you to apply or remove tags throughout any point in a campaign. Use this tool wisely and it will become your best friend for keeping track of your users.

☆ **CREATE TASK:** The creating a task icon is one that is incredibly helpful for your sales team. For example, if you had 3 emails going out in a sequence and by the last one the user still hasn't taken the steps to achieve the next goal, you may consider using this icon to create a task for one of your salespeople to either call them or email them directly, whatever it may be. This is a great way to create balance between automation and

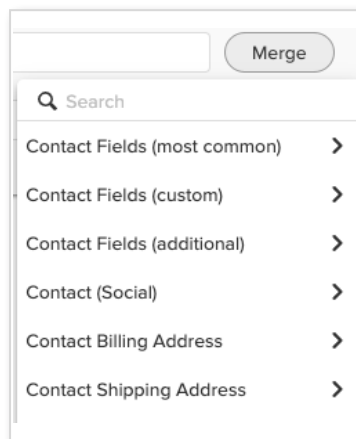human contact during the campaign.

☆ **ASSIGN AN OWNER:** The assigning an owner icon can be your secret tool to success if it is used properly. If you had a campaign based solely around lead generation and one of your lead users achieved a certain goal, you may use this icon in the following sequence to assign the lead to a specific sales person (or you can also use the 'round robin' option for this which means the user will be sent to all your sales people and it will be up to the fastest person to snatch them up). This icon is really about not allowing any of those leads to slip through the cracks and get lost.

☆ **CREATE APPOINTMENT:** Again, creating an appointment (much like creating a task) is taking a lot of the pressure off of your sales team to keep up with each lead or client. It reduces the potential for human error. When an appointment is automatically made it will keep things organized and much easier for your sales team to focus on selling.

☆ **FULFILLMENT LIST:** This icon just simply keeps track of the number of people that go through the campaign and reach this point. Keap can then send you a spreadsheet with the names of those people. This icon is great for reporting which we will get into a little later on so stay tuned!

> **PRO NOTE: make sure that any time you edit an icon while you are building your campaigns that you switch the toggle in the right hand top corner of the screen from "draft" to "ready". This saves everything and gets it ready and waiting to be published.**

Merge Fields

Merge fields are how you automatically personalize the content that is going out, saving time and potential errors. For at least every communication icon in the campaign builder, or messaging section in email broadcasts you can input merge fields. This allows you to, for example, send a blast email saying "hello - contact first and last name" automatically if you have that person's contact name in your CRM it will know the person's name who it is being sent to and input their name. Genius right? That's not it though, if you don't have their name you can go into marketing settings in Keap you can edit the fields to still say something friendly in place of their name. This feature just really helps you to make the customer experience a lot more personalized and make your users feel valued. And don't worry, there are a lot more merge field options than just someone's name!

Segmentation When Building Campaigns

I know what you are thinking at this point, "what if I want all my leads/ users to go into the same campaign but not all end at the same point depending on their behaviors". And don't worry, Keap has a fix for this too. You can use 'decision diamonds' within your campaigns where your users can separate into different sequences based on their actions prior. Say you start a campaign and once the users hit a certain goal you need more information to decide what to do with them next. You would implement a decision diamond which would allow you to gain more information about your user and determine whether they move forward in the sales process or perhaps need to go down a different route with your company first. To do this, after a goal rather than dragging just one sequence you will drag two and connect the line from the goal to both, when you do this a diamond will pop up. From there you can create two completely different segways for users within the same campaign and speak to their individual needs.
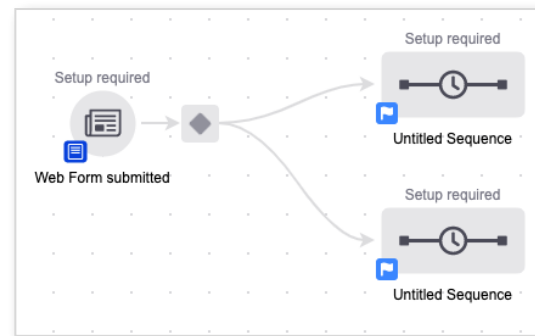
Again, as with everything in the campaign builder, to configure the decision diamond just simply double click on it and from there you will create your rules to determine which path your users will go down depending on their behaviors. However, watch out because if a user doesn't meet any of the conditions to enter your pathways they will automatically leave the campaign and no longer hear from your company again. You don't want this to happen, therefore you can choose which pathway you would like for them to go down if they don't meet either criteria so that no matter what they don't drop off and get lost.

Just so you know, you don't have to start from scratch on every campaign. You can also copy from one campaign to another to save yourself a lot of unnecessary time! To do this, in every section of the campaign builder there is an "actions" drop down in the top right corner and there you have the ability to "copy from another campaign" and pick the specific campaign you want to copy. You can also copy emails, sequences, web forms etc... all from that nifty actions drop down!

Finally, be sure that once you think you have your campaign built, you test it using different test email addresses. And then once you know it works correctly, publish it by clicking the 'publish' button in the top right corner of the campaign builder. Once it is published, it is live and ready to go. Note that you can edit campaigns once they are live if you need to, however here are some rules to this:

☆ **Adding a sequence after a sequence:** When doing this you can rest assured that for any active contacts that are currently in a sequence if you add another sequence after that they will automatically go into that new sequence and it will be as though it was always there. However, any contacts that are queued and not achieving the goal before it will automatically be sent into the new sequence and begin receiving that content. Make sure you know if you want this to happen or not as it may be a game time decision.

☆ **Adding a sequence after a goal:** If you add a sequence after a goal that originally had no sequences after it, for those that have already achieved that final goal they will not automatically go into the new sequence you are adding because the campaign has technically finished for them. If you want them to enter the new sequence you will need to go into the reporting section of the campaign builder and manually add them in.

☆ **Adding a goal before a sequence:** Goals that are added can only be achieved in the future and therefore for those that are already in the sequence after it they will never have to achieve said goal. However, when you add the tag applied goal before a sequence, Keap will automatically recognize that you have contacts that are tagged as such and aren't in the campaign and ask you if you want them to be entered.

☆ **Adding a goal after a sequence:** Just like adding a sequence

after a goal, for those that have already passed through said sequence the goal you add will not automate for them but it will for the users that get through the sequence after you add the goal.

☆ **Adding new steps inside a sequence:** If you want to add new steps into a sequence, which often you may because you will start to think of different communications you want to happen that you don't have in there. Therefore when doing this you will need to duplicate the steps that are currently in the sequence and as you edit them Keap will understand that you want these new steps to happen. So once you hit that publish button it will reconfigure the steps in the sequence and for anyone who enters the sequence after the fact it will be like those steps were always there and for the users that were already in the sequence it will change their position and automatically send them the next logical step in the sequence based on the time they have spent in there already.

☆ **Changing your campaign sequences:** You certainly can change an entire sequence if you feel the need to, however, make sure you never delete the sequence that is currently in there if you have contacts that are queued up in it because they will automatically be deleted out of the campaign. Instead, duplicate the sequence you are wanting to change and switch the line from the goal preceding it to go to the new sequence. This way the users that were already in the original sequence will not be affected and will continue the way they were supposed to and any user that enters from now on will go into your new sequence.

Now, be conscious that this was a very high level overview of building a campaign. If you work better with visuals, watch our webinar here (insert link) where we take you through building a simple campaign step by step.

Section 3 "Zapier Integrations"

Zapier is a tool that helps you connect tasks between two different apps or technologies without having to create custom API connections. This helps support automations not only in your Keap platform but with a plethora of other softwares you are using in your business.

Remember when we mentioned you can also within a sequence choose the 'create an appointment' icon? This is obviously an incredibly helpful tool that Keap offers to automatically set appointments for your sales staff. However, if your company already uses an app such as Calendly to schedule appointments and meetings then here's some good news: Keap integrates with over 1500 applications which means you can directly link your campaigns to any of those apps that Keap offers integration with. To see exactly which applications it connects with just click on the menu tab on the Keap home page and under CRM you will see the Zapier Integrations button.

Connect your Keap application to 1,500+ apps

Keap and Zapier have partnered to bring Keap users premium Zapier integrations for a **free 90 day trial**. Zapier moves information between Keap and your web apps automatically, so you can focus on your most important work. Decide which Zapier integration you would like and click *Use this Zap*.

Already have a Zapier account? Click here to see all of the web apps that you can integrate with Keap.

Create or update Keap Max Classic contacts from new Facebook Lead Ads leads
Facebook Lead Ads + Keap Max Classic
Use this Zap

Create Keap Max Classic contacts from new Acuity Scheduling appointments
Acuity Scheduling + Keap Max Classic
Use this Zap

Create or update Keap Max Classic contacts from new Calendly events
Calendly + Keap Max Classic
Use this Zap

Create or update Keap Max Classic contacts with new contact activity on ClickFunnels
ClickFunnels + Keap Max Classic
Use this Zap

Add new Shopify customers to Keap Max Classic as new contacts
Keap Max Classic + Shopify
Use this Zap

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com

Section 4 "E-Commerce"

The e-commerce section of Keap can be very valuable to your business if used correctly. When linking to campaigns you can set up goals such as 'product purchased' and then have the ability for a user to pay for such a product directly through Keap. Therefore your campaigns can be e-commerce based without having to link them to your website.

The e-commerce element allows you to list and store your products and services as well as creating bundles and discounts straight from Keap. Equally, you can create order forms, shopping cards and payment plans as well as having the ability to create and manage orders and subscriptions. Keap obviously gives you the ability to trigger automations when someone purchases a product with you and all of this can be intertwined into your campaigns if you decide to make them e-commerce based.

These abilities aren't only offered as one time services. Keap billing can be put on a timer and used for recurring billing. This means that if you have a subscriptions based service for example, you can completely remove any administrative burdens in billing by using the Keap to automatically bill the client.

Such as the Zapier integrations aspect, the e-commerce abilities that Keap offers are easier to understand when being explained visually.

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com
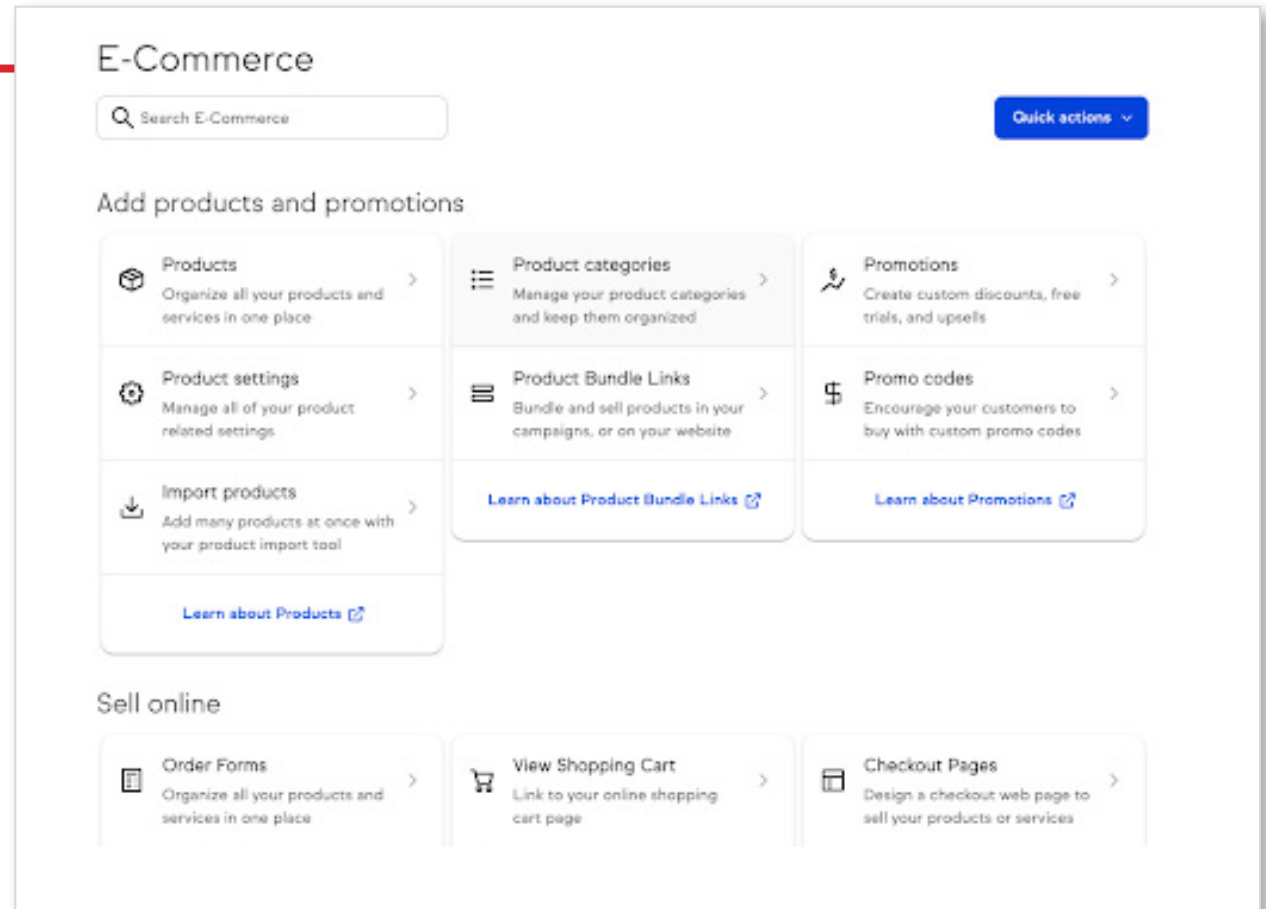
Section 5 "Lead Management"

Keap has an inbound lead generation section which allows you to monitor the visitors to your website, your lead source conversion rate and your ROI on leads. However, one of the biggest powers that Keap gives its users are the abilities it offers for lead management.

As we mentioned right back at the beginning, it is incredibly important to your business' success that your leads don't go falling through the cracks due to your sales team being overwhelmed with work. Of course, this is where Keap as a whole comes into play and offers you the ability to keep everything in one place, tracked, automated and manageable - what more could you ask for? (We're guessing you're thinking "well I'd ask for someone to manage it all for me if I could"!

Lead Generation

Manage Tracking for Your Website
- Get Tracking Code for Your Websites
- View a Report of Visits to Your Web Sites

Lead Sources
- Edit / View Lead Sources
- Create Lead Source
- View Lead Source Conversion Report

Return on Investment Lists
- View Leads by Source
- View Leads by Source Category
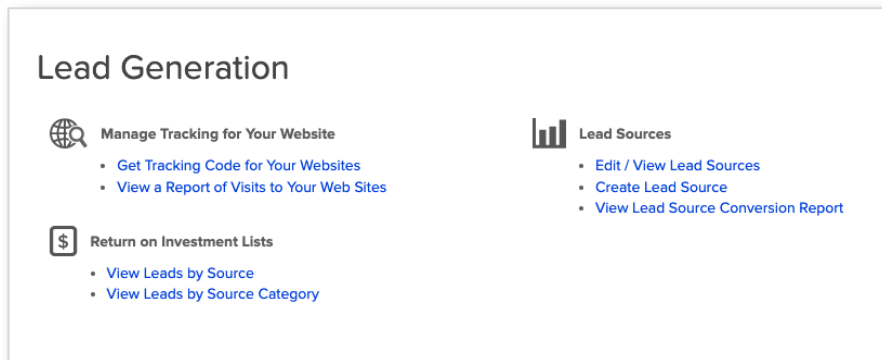
Don't you worry, stick around until the end and we will show you how Drive Creative can help you do just that)

When it comes to lead management within Keap, most of it will be coming from your campaigns and ensuring you are using the right icons in the right places at the right times to keep a detailed history of everything your users have done with your business. The way you do this is with the tag applied and note applied icons. Both of these allow

you to put your leads into categories and input a detailed description of where each contact is in the sales pipeline so far.

Now, on top of that we need to be sure that those leads are eventually being contacted directly by your sales team. This is where using automation and human interaction is most valuable. Use the 'assign and owner', 'create task' and 'create appointment'/ Zapier integrations icons and options in all sequences of your campaign. To have the best outcome when it comes to lead management, use the note and tag icons at the start of all of your sequences and the ownership/task icons at the end of all of your sequences. This way, no matter what you are getting a detailed description of your users pathway so far and your sales team are being notified when it's time to make contact and they have those details at hand so they know how to start the conversation.

Assign an Owner

Create Task

Create Appointment
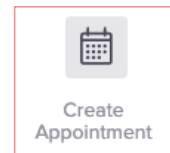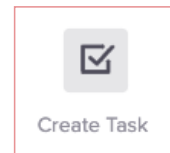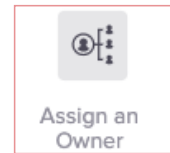
Hopefully, you can see just how powerful Keap can be when it comes to lead management and ensuring nobody gets forgotten about. Of course, it is still on your sales team to do their jobs correctly and make that contact but at least with the automation Keap offers they are being given a helping hand from beginning to start.

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com

Section 6 "Reporting"

Reporting is a very powerful tool within Keap to understand how your campaigns are working and if they are sparking interest from your users.

Remember when we said we would get to the reporting aspect of Keap when we were explaining the fulfillment list icon ? Well, here we are! Let us start off by saying that not only does Keap's reporting system help you to understand the effectiveness of your marketing strategy but it also gives you transparency and predictability in your sales.

The reporting service that Keap offers can greatly benefit you when trying to understand the ins and outs of your sales funnel. It gives you a detailed look into what campaigns are working for your company and users and what campaigns are not sparking interest. This will help you to determine where to spend your time, energy and money when it comes to marketing and sales.

It also allows you to create some predictability in your sales. If you have a campaign which ends with the goal of purchasing a product, the reporting tab will show you how many people have hit that end goal and purchased your product, how many are close to it and how many dropped off. Overall, this helps you to forecast your sales much better and again some predictability in your projected sales income.

Finally, it also just simply lets you understand which campaigns work best for you. When you are able to see what campaigns are getting consistent activity and which ones are not you can gain a much better understanding of what your customers are looking for and what type of campaigns work to generate leads for you.

There are two different ways to see your reports. The first is the campaign reporting tab. This shows when you publish a campaign, straight away you will automatically be taken to the 'reporting tab'
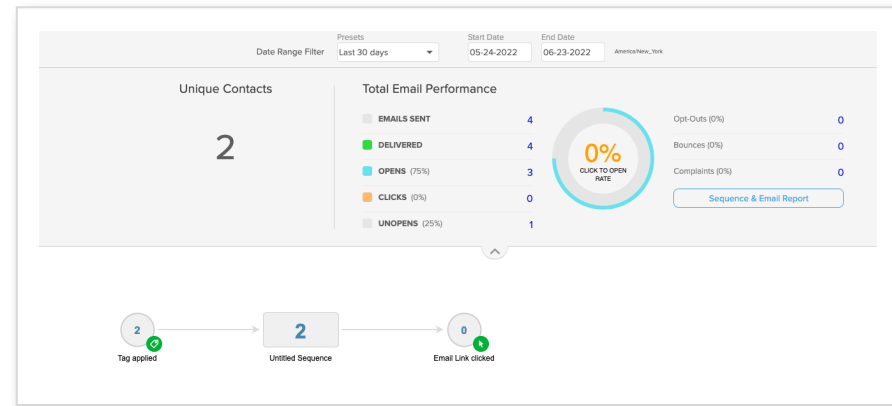
which shows you your campaign in just a slightly different way. You will see a number in the middle of each icon which is simply telling you how many contacts are in that step of the campaign. You can change the amount of time passed that you want to see from the last 30 days to the last 24 hours, or you can also manually enter the start and end date you would like to see the report for. These number represent 3 different contact statuses:

Active: *this means the contact is currently in the sequence and has steps remaining before they complete it.*

Queued: *this means these contacts have completed all the steps in said sequence but have not moved on to achieving the goal that comes after it.*

Done: *this means the contact is no longer in said sequence as they have moved on or achieved a goal.*

When looking at your campaign report, if you hover over the different steps where the numbers appear a blue circle with a person inside will appear in the right hand corner. When you click on this you will be taken to a list of contact names showing you exactly who those numbers are. To see

everything more in detail, as always double click on the section and it will give you a deeper look into all the data that has been gathered.

At the top of the reporting screen you will also see an 'email performance' section which can show you the details and performance of your emails that have been sent within the campaign. You will see your click to open rate, how many were successfully delivered, how many were opened/unopened. On the right hand side next to this information you will see the number of emails that bounced, how many people opted out of your campaign and how many complaints you got.

Total Email Performance

EMAILS SENT		4
DELIVERED		4
OPENS (75%)		3
CLICKS (0%)		0
UNOPENS (25%)		1

The second way to see your reports is by going to the drop down menu and under 'marketing' go to the 'reports' section. Here you will be shown different report options that you can see, the ones we consider to be the most valuable are:

☆ **Campaign contacts:** This shows you the steps within a sequence. You have a good amount of ability to filter the information you want to see as well as mix and match the campaigns you are interested in viewing.

☆ **Unique campaign contacts:** This is similar to campaign contacts but a little less flexible. You can filter by contact or campaign and decide on any detailed information you want to see. From there you can decide what you deem as important results and what you don't. However, don't be fooled by the numbers here, it may not be the number of individuals as the results will show one for every time a contact has been in a sequence (two for two sequences, three for three etc…).

☆ **Campaign goal completion:** This represents exactly what the name suggests, how many people have achieved goals within your campaigns.

☆ **Sequence step recipient:** This simply shows you which contacts have received steps within your campaign sequences.

☆ **The email reports:** These once again, quite obviously show you how your emails are doing with your contacts within a specific campaign.

As you can probably tell, being able to see the progress of your campaigns and how your users are interacting with them is a hidden superpower for you. It can allow you to make decisions on upcoming campaigns, editing current campaigns and building drip campaigns. You will no longer have to ask yourself where most of your leads are coming from or what your contacts are most interested in because the reporting tool will show you all of this.

248.579.9972

425 S. Main St., Rochester, MI 48307

www.DriveCreativeAgency.com

A Holistic Approach to Marketing

WARNING Read before moving forward!

Automation isn't a silver bullet to your marketing challenges. It's the tool that ties all the pieces together and provides your customers with an enhanced buying cycle. While it's great to start automating your processes at any time, it is important to take a look at your branding and marketing strategy as a whole and answer these questions....

1 **Can you without a doubt clearly articulate 3 reasons why customers do business with your company?**

If you answered no, that's ok, but you must figure this out if you want your marketing to be compelling. These 3 reasons don't all need to be unique from your competition, but they shouldn't be able to get all 3 of these at a single company besides yours.

2 **Without the assistance of a sales person, does your current brand messaging clearly explain the value you add to your customers?**

If you answered no, you're not alone. A lot of companies focus their marketing on what makes them great vs. what's in it for the customer. If you focus on your customers needs and the value they get, you will notice a much higher response rate from your campaign efforts.

If you answer yes, again, GREAT WORK! Move on to #3.

3 **Do you currently have the strategy you need to get this message to your target audience?**

If you answered no, it's time to create a marketing strategy. Automation is only going to work if you have people in your sales and marketing funnel.

If you answered yes to all 3 of these questions, Kudos! You're a prime candidate to hop right in and start scaling.

Answered no to any of the above questions? No problem, we can help with this!

DRIVE CREATIVE AGENCY

Creating your sales, marketing, and automation hub can be time consuming. Our agency offers the full package to marketing. Not only are we experts in building out automation, but we are a creative agency with years of experience in website design, branding, video production, content creation, and more. We have a 3-tier service plan offering that we offer clients who are interested in scaling their sales and improving processes.

Tier 1 — DIY {STARTER}

Our DIY tier is as it sounds, do-it-yourself. We are a Keap certified partner and give you the ability to purchase Keap through our partner portal. We are happy to also offer consultation during the on-boarding process.

☆ **License to automated marketing software**

☆ **Access to blue-print funnels**

☆ **Access to automated marketing learning center**

☆ **Consultation and coaching**
(optional additional fee)

Tier 2 — BUILD OUT {INTERMEDIATE}

This is for clients who need some up-front support but have the means of handling their marketing after the systems and game plan has been created.

☆ **License to automated marketing software**

☆ **Access to blue-print funnels**

☆ **Access to automated marketing learning center**

☆ **Consultation & coaching**
(included for duration of project)

☆ **Data import to software**

☆ **Marketing & sales automation strategy**

☆ **Marketing & sales automation setup**

☆ **Branding, website, videography, and other creative support**

Tier 3 — LEAD GENERATION {ADVANCED}

Our lead generation tier is for clients who are looking for a full-service approach to lead generation and marketing automation.

☆ **License to automated marketing software**

☆ **Access to blue-print funnels**

☆ **Access to automated marketing learning center**

☆ **Data import to software**

☆ **Marketing & sales automation strategy**

☆ **Marketing & sales automation setup**

☆ **SEO to increase your brand exposure & organic website visitors from Google**

☆ **Full digital marketing campaign execution to drive new leads**

Contact Drive Creative Agency Today for a Free Marketing Consultation

www.DriveCreativeAgency.com   425 S. Main St., Rochester, MI 48307   248.579.9972

Schedule a Time to Talk to an Expert

Corey Barkach - Co-Founder of Drive Creative, Dragon Slayer

Schedule a meeting with my Calendly link if you'd like help building your next marketing campaign!
https://calendly.com/corey-drive/keap-automation-discussion

Call Direct 248.762.2068

eMail corey@DriveCreativeAgency.com

DRIVE

CREATIVE
AGENCY

WWW.DRIVECREATIVEAGENCY.COM