

## **Transcripts from the Effective Sales Funnels Tips Without Underhanded Tactics episode:**

You might have noticed that there are two places in the intro to our show where we talk about very specifically phrases that I loathe in marketing; tripwires and funnels. We're not gonna get into tripwires today but I want to talk to you about ethical, empathetic, and impactful conversion funnels. I wanna talk to you about how to stop thinking about putting a whole bunch of people into the top of a funnel and squeezing out a few at the bottom, coz that doesn't sound fun.

I don't want you to think of your business as a funnel. I don't want you to think about your marketing system as a funnel, and instead flipping that over on its side, letting everybody have plenty of space and thinking instead about creating ethical, empathetic, and impactful customer journeys. Think about, instead of building a funnel for your business, building a path for people to go on a beautiful journey. That's what I want you to shift your thinking for as we have this conversation.

And I know, I tricked you a little bit with the title of this episode, because if I tell people we need to create a customer path, most of us don't know that phrase yet, I'm working on that. And I might even come up with a good name, one of these dates, but y'all know I'm not so good at naming things, but conversion funnels feel gross because they kind of often are gross. They are designed to pour a bunch of people in the top and manipulate the hell out of them until we squeeze a few through the bottom which means they give us cash. To me it feels better to take our potential customers on a leisurely stroll.

What if we stopped feeling like there was pressure and huge amounts of urgency on this, and all took a deep breath and thought of it as a nice walk in the park, or maybe we have to walk you through some not so great things because the thing that we sell really does address things that are hard or scary so that we can get to the place where we can go for a walk in the park. However you wanna frame that, I really would like for you to start thinking more about paths and customer journeys and less about funnels. And I was listening to Stacey Abrams.

If you're listening to this in real time, we're a couple of weeks after the 2020 election, and I was listening to Stacey Abrams talk about the work that she did with fair fight Georgia and how that's been the work of over a decade. And that the center of that work is using data to find those who need and want to be in, those who want to be enfranchised and able to vote and a part of the government system, instead of using

data to keep people out which is how traditional electoral politics has worked. Our customer journeys work the same way, especially in digital.

We're using data to help the people who want to be in to help the people who want to go on our journey with us, to help the people who want to like get in the minivan and go on vacation with us, to be in. So instead of thinking of using data on these journeys to do gross things and manipulate the fuck out of people, like is what happens in digital marketing traditionally, we're going to use data to help the people who want to be in who want to be resourced, in the way that we have to offer, to be in. So what are some of the key components of those journeys?

Well, there are some really important key pieces that you need to have for a digital journey. So I'm going to go over those with you now from first to last, and then I'm going to talk about some of the shitty things that digital marketers typically do when we're creating those and what to do instead. And then finally, we'll wrap it up with a couple of cool tips that I've learned along the way about creating great customer journeys. So the first thing and the thing that you won't usually hear about from most digital marketers is the first point in your customer journey is usually where someone finds you off of your own platforms.

So this is either in a search engine or on a social media platform. And we're going to talk specifically about search because as we have been discussing, I'm getting out of the social media game for a while. So the first place that you need to think about in your customer journey associates with your metadata and your search factors like keywords and things like that because, and we often skip this, like we often think of the first step of our customer journey as that customer or prospective customer landing on our webpage, whether it's a learning page, our home or a product page, we often think of that as the first place, but it's not, because how did they get there in the first place?

Less than 10% of your site's traffic for a typical website will type your domain into a search engine or into a search bar, they don't know who you are. A big goal of your website ought to be, to get new people to discover you there. And that means that the first step is how you set up your metadata and how you think about the way you want to come up in search. This is what we call an SEO SEM strategy. So when you are thinking about that first place, that first interaction with a customer, it may just be in your metadata.

And yet many of us don't even write metadata. And just to recap, and we have a whole episode on this that we'll link to in the show notes, but metadata is what shows up in a Google search or on a Facebook post that shows what the website is about. It also may be images that show in an image search and very few of us put

any time and intentionality towards making sure that our metadata makes a great first impression and makes it easy for a potential customer to have their first interaction with us.

So when you're thinking especially from an SEO SEM strategy, when you're thinking of your digital strategy, take some time with that metadata. Make sure that for a new person who knows nothing about you, someone who's just at the trailhead and trying to decide if they wanna take that right turn and walk down the trail with you, in a sentence or two, what do they need from you? That needs to be written into your meta title and your meta description? And for more details on how to do that, you can go back and listen to our episode on metadata.

Then in conjunction with that, search factors are gonna play in here. Where do you want that metadata to show up? That relates to your keyword strategy and your backlink strategy, and those are really important for the initial customer journey. It's why we always start new relationships, 100% of the time y'all, never do work without these. With personas, keyword strategy and a metadata audit, because this allows us to make sure that new people are finding us and that the right new people are finding us and being brought into our fold, taking that turn to go down the path with us, in the right way.

Now, this is not an area where we are experts but the other piece plays in here particularly if you're focusing on a wholistic search strategy is ads factors because it may not be that the first impression that someone has from you in a search is from your organic ranking. It may be that it's coming from your ad. So you do want to also consider if you're using PPC or if you're using Facebook ads or LinkedIn ads or something like that, what that first interaction looks like with your ad. This is, ooh, this is the first place where people are likely to be manipulated as fuck.

Don't do it. Manipulative ads, they work, but they suck. And if you manipulate people into doing business with you, you often have the same problems as when you manipulate people into anything else. You're constantly having to do that in order for the relationship to still work. And it feels gross for you, it feels gross for them. And the other thing that happens when you use an ad to manipulate someone to get them on your page, is often what's on the page doesn't match what was in the ad and then your ad is a giant waste of money.

Here's an example of that. If you're telling someone in an ad that you have an easy and fast way for them to get, I don't know, help with their accounting, but then when they come to the page that that ad links to, and they have to pick up a phone and call you in order to have an interaction, it's very likely that that ad is not gonna perform for you anyway because you manipulated the person to get them onto your

page saying that the process was easy and fast, and then when you got them there, tried to make them fit into your funnel, try to make them call you, instead of providing the thing that you promised.

So, that's a pretty innocuous, like not super harmful way that we manipulate to our detriment but it's one that I think a lot of us can understand. So make sure that if you are running ads, those ads are truthful about what they're going to get on page and make a really great first impression. That'll make your ads perform better and it will make you more in integrity with your brand. So once we have that initial interaction in the metadata and with the ads that's when people have that first connection with your content.

Now this can come in a lot of different ways. It could be on your website. It could be on a blog article or a guest article. It could be coming across your podcast or a video on YouTube or even a social media post, but that first interaction with the content is the place that most of us tend to spend quite a bit of time. So I'm not gonna go too in depth here, except to say that with the content, you really wanna make sure that you are creating a really comfortable journey for your customer or potential customer at this point.

You want to make sure that you are confirming that you understand what is going on with them, that you are confirming that they made the right choice to give you their attention, and that you will honor that choice by being straight with them and honest with them. And you can do that in a variety of ways, most of the best ways do not explicitly state that, they simply honor the client and their attention by providing the highest value information you possibly can in whatever medium you're providing it, and keeping the promise that you made with your metadata or your ad or whatever, with that on-page content.

We're gonna talk a lot more over the coming months and particularly in season five, about what epic, amazing, content looks like. And like I said, most of you are spending most of your time right now on content. So for now, I'm gonna move on from that one to the next piece. This is the piece that kind of causes pain for me because many of you are doing one of two things here. Many of us, I'm been guilty of this in the past too. You're either not providing a clear next action at all or you're providing a clear next action that is really shitty, and shitty for different reasons.

If you're not providing one at all, that means you have this great piece of content that you spent all kinds of time on, but then you're giving no indication of what the person who enjoys and consumes this content should do next. And it may be because you feel gross about asking them to do something next because digital marketers often make this next step super gross. But guess what, it doesn't have to

be gross. So what is the next step? The next step is the opt-in. This is where someone says yes, this content, whether it was a podcast or an article or a video or whatever was so great for me that I want more from you.

Maybe I want to download the worksheet that goes along with this article. Maybe I want to buy the calendar or the meal planning worksheets that go along with this video. Maybe I want to join your membership program that goes along with this content guide. It's something that is either free or very low cost that allows someone to take a first baby step into your world. This piece is so important to get right y'all because if you give them something extraordinary here you're going to create a new raving fan in a way that feels awesome.

If you manipulate here, you are going to create possibly a new raving fan, but in a way that constantly requires you to hit the pain button and manipulate. And if you provide a less than incredible amazing thing here you're gonna lose that person's trust. So don't underestimate. I don't wanna put too much pressure on you because we all have to learn, but don't underestimate the power of this first baby step thing that you offer through the opt-in. And sometimes this works best to be a paid thing. For example, most of our early initial things are paid.

Like you can do a persona workshop with us, or you can come in for a pulse check consultation or something like that, but if your thing is a, you know, if your product is a membership for example, maybe that first baby step thing is some kind of a downloadable. Maybe it's a free trial of your membership. So it doesn't necessarily matter whether it's paid versus not, and often we will try both with clients to see what works better, what matters is that this experience is extraordinary and it solves the immediate problem for your potential customer.

Ideally it solves it in a quick and efficient way, if that is possible, and that does mean that you might have to break the bigger problem down into something small. For example, I work with lots of people that their work with their clients is work that's done over the course of multiple months, sometimes multiple years that really requires deep dives into a lot of stuff, good and bad. So is there a way that you can give the client a quick feeling of satisfaction, and or a quick win so that they can try you out?

This is why I love templates or meditations or a sample exercise routine, or a free trial, or things like that as our early opt-in, because it allows people to experience what it is to do business with you without being super manipulated. Incidentally, this is where the squeeze page and the tripwire often come in. I loathe those techniques and the fact that they are called what they are called should probably tell you why

but we can talk more about that in a future episode. Now, once you've gotten through the opt-in piece, the next step is the follow-up.

This is a common place where people fall off as well. So there will be a piece of content. There will be an opt-in, but then beyond the email that delivers whatever the opt-in thing is, there's no follow up. So follow up usually comes in the form of an email journey or retargeting possibly for ads or calls or reach out from a sales person. The follow-up is designed to nurture the person who took that first baby step with you to help them feel good, to make sure that they were able to use and implement the thing that they opted in for in the first place, so that you can eventually help them if it's the right fit for them to continue on the journey with you through the main offer. And the main offer is the thing that you're selling.

Now, some of us may have more than one main offer. Like you may have retainers and courses and products or something like that, but each customer in general will have a journey built out for them over time that relates to one main offer at a time. So whatever the main offer is from that opt-in, there needs to be a follow up system between opt-in and main offer, and sometimes that follow-up system only takes a couple of emails and sometimes it unfolds over years.

That has to do with what's going on in your potential customer's life, it also has a lot to do with how complex your product or services and or how much risk factor is associated with it. So for example, the followup timeline from opt-in to purchase of a main offer for a business coach could be several months whereas the follow-up from an opt-in to a main offer for someone with a membership could be a week. So it just depends on what your offer is and how complex and or risky it is, and y'all, okay. I've been wanting to say this for a while, and it may not exactly go with this episode, but we're gonna say it here anyway, if your main offer is coaching or healing work.

So if you are a business coach or a life coach or some type of a healer, I want you to understand that your work is very high risk. Making the decision to work with a coach or a healer can transform your life, and it can also really fuck you up. And there are so many people in the coaching space, in the healing space, that have not done their own work and, or are not properly trained that your offer is a high risk offer, and you must treat your follow-up journey as a result.

If you want to honor your customer, if you are a coach or a healer and you want to honor your customer, you must treat your follow-up journey from opt-in to main offer as if your customer is making a high risk decision, because they are. I am sick to death of this idea of like, just try it out and see how it works for you. Coaching and healing is huge and it can change your life but it can't hurt you, that is bullshit. If you

work and put your trust in a coach or a healer who doesn't know what they are doing, they can traumatize you, they can hurt your business.

They can make it harder for you to heal in the future. They can make it harder for you to do the work that you need to do with a legit coach or a legit healer in the future. Therefore, this is very high risk, and we need to stop this bullshit idea that we don't have the potential for harm. And one of the places that we stop this is that between an opt-in, between that toes in the water let me see how this goes and a main offer, we need to take care of that potential client that potential customer, we need to help them feel safe. And we need to demonstrate how we are responsible with the gift and the fragility of their time, attention, and trust that they are giving us.

That is what doing better means in this context because you can have the best intentions in the world. If you are not properly trained, if you are not properly informed, if you have not done your own work, your impact is often really, really problematic. And every single customer I have ever worked with has frustrating and or traumatizing stories about coaches, healers, and digital marketers that they have hired who have done them harm. So you are building trust and proving that you are worthy of that person's attention and trust in this process of follow-up between the opt-in and the main offer. Do not take this lightly because coaching, healing work is high risk work. All right, I'm gonna crawl down off the soapbox.

For those of you who are not coaches and healers listening to this, I apologize, but I know there are a lot of you out there in that space listening to this, and I needed to have that conversation with you because this idea that your work does no harm is doing a lot of harm y'all. So what do you do after the main offer, when they've bought that thing from you? This is much better, happier thing to talk about. That is when we get to do the delightful delivery.

Don't skip this part. This is how you deliver what you do and how you set up the things around it, like automated emails or how you collect payment or if you send gifts to your clients or whatever those are, this is the delightful delivery for the customer. And many of us spend a lot of time creating a sales path and don't take the time to put as much intentionality into the way that we deliver the thing. So please take some time there. And this cycle repeats itself over and over and over again y'all. Metadata search factor, ads factors, content, opt-in, follow-up, main offer, delightful delivery.

There's not really an end. If we're doing the right things in our work, it goes cycle after cycle after cycle, and some of us, depending on the type of work that we do it'll be new customers and clients coming in to go on a journey with us over and over again. And some of us will be doing this journey over and over again with the same

people and bringing in new people less often. Wherever you fall, I'd love it if you would take the time and space necessary to put some intentionality into each of these steps. Now, it doesn't mean that you can't build something small to start with, one article, one opt-in or landing page, one email, and put some intentionality into it over time.

Next month add another email, next month work on optimizing your metadata, the next month add an awesome thing to delight a customer after they've bought from you. If you stop thinking about your customer journey as a one and done, you can start thinking of it as like riding along with a friend and making the experience better and better. Once you do that, it becomes a lot easier to avoid the shitty things that digital marketing people do, like manipulating pain instead of solving problems, like not really telling the truth about what we can and cannot do for them. Like automating products and services that shouldn't be automated. Like putting shitty, fine print into our stuff that really isn't about helping our customers but is about avoiding problematic business practices on our side.

When we think of taking our customers on a journey, like going on a nature walk or riding in a minivan with our friends, we're likely to avoid some of these shitty practices. We don't have to manipulate in a negative way in order to be effective and successful. Being great at marketing and sales means being great at solving problems. And you can solve problems for your potential clients in a beautiful way, without pushing the button of their pain, that so often happens in this space. You can solve problems without promising things that are not real. I'm looking at you anyone who tells someone they can make a million dollars in 30 days and or anyone who promises a seven-figure business to someone who's never been in business before.

And we can think about where we are on the journey, whether or not it makes sense for things to be automatic, whether it makes sense for them to be cookie-cutter or whether they really need to go deeper and have more one-on-one experiences. These are all things that we would do if we were treating our customers more like people that we love, more like friends and less like widgets and commodities. This process is really important and it doesn't have to be gross.

So if you are thinking about your customer journeys a lot right now or if you are wanting help in making sure that your customer journeys are both effective and not gross, let us know. We would love to help you with this. In fact, we are taking applications for three digital strategy partnerships in 2021, and you can find reference to those in the show notes where you can go fill out an application if it's something that you are interested in. And I say that because we've been having a lot of fun with customer journeys this year and I'm really excited to be able to share that



with some new people in 2021. And I'd love to know from y'all, how did you build out your favorite customer journey?

If you have one that you like really love, how did this develop for you? Shoot me a message and let me know because I'd love to interview you about it for season five. All right y'all, I am very excited that we are just two, no three episodes away from our 50th episode which is going to coincide with the end of 2020, and I am just feeling all the feels right now for what that means, so I just wanna say thank you for working through this with us. Thank you for thinking about your customer journey and how you can make it less harmful, more empathetic, and more impactful. I'll see y'all next week.