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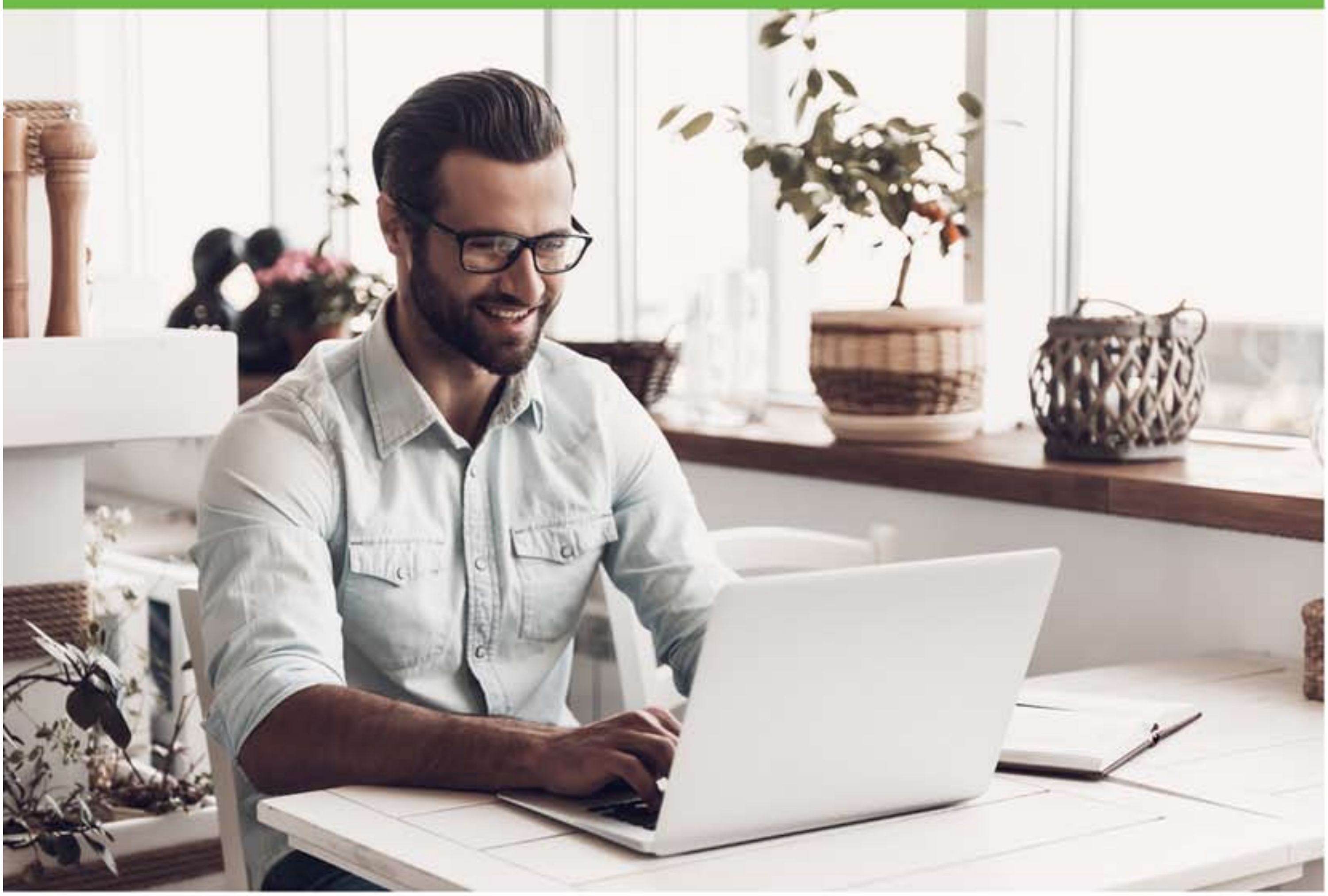
THE HEALTHY DATABASE CHECKLIST



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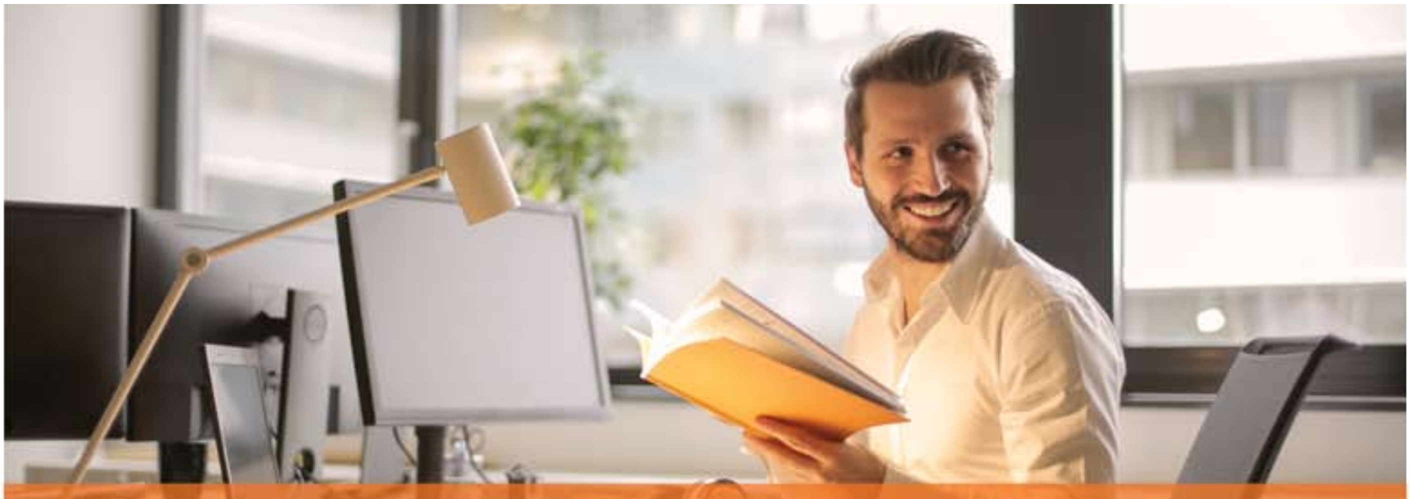

Every person in your database (or as we like to call it, your peoplebase) provides a fresh nugget of opportunity. Make sure you're opening every door you can for new business by nurturing them with consistent communication, and follow this checklist to maximize the connections you have with your peoplebase.

STEP 1: Capture everyone's contact information in one place.

Pro-Tip: List each source you have for new leads and determine what groups of people are in your current peoplebase (cold leads, past clients, sphere of influence, current clients, and prospects).

Also ask yourself, "Who do I meet on a daily basis that I should try to keep in touch with?" (Call-ins, business contacts, networking contacts, community connections, referrals, etc.)

STEP 2: Organize these contacts into 4 buckets or 'audiences.'

- People who know you and are ready to buy (prospects, friends/colleagues who have expressed interest).
- People who don't know you and are ready to buy (fresh leads, call-ins, referrals)
- People who know you and are not ready to buy (friends, family, sphere, past clients).
- People who don't know you and are not ready to buy (cold "dead" leads, old referrals, people you meet on the street, the cashier at CVS).

Pro-Tip: Think about the kind of communication each group wants to receive from you that would respect the relationship. People you know who are not ready to buy would prefer relationship messaging over service updates and calls to action.

STEP 3: Create acknowledgement content for each contact group/bucket.

- ***Sphere:*** Include an initial, quick message to set the expectation that you'll be keeping in touch more frequently
- ***New Leads:*** Ask specific questions about what they're looking for and discover their timeframes.
- ***Old Leads:*** Ask if they're still interested, and maybe apologize for not following up more. Let them know you're ready to help when needed.

Pro-Tip: If you want to be a lead nurturing mastermind, create "Checking In" messages that will connect with each group automatically.

STEP 4: Create an email communication strategy that appeals to each of the four contact groups.

Write 4 - 5 emails for each contact group.

Pro-Tip: For old and new leads, use these messages as an opportunity to position yourself. Think about what makes you different and better than others in your industry, and determine what benefits your customers enjoy most when they work with you. In each message, focus on one positive facet of your service.

For those who know you, generate messages that show appreciation or share useful information. Focus on topics you would share with your friends… even if they aren't related to your industry.

STEP 5: Include a 'call to conversation'

Examine every message and make sure you've asked questions and piqued enough interest for your recipients to want to learn more.

Pro-Tip: Short, non-threatening questions work best for new leads. Avoid sales questions in your initial response in favor of questions that are more likely to be answered.

For people you know, consider simply asking, "How are you?" or "Let's catch up. Coffee this week?"

STEP 6: Drop the email template and flashy graphics.

The less it looks like marketing, the better. It's relationship email for your relationship business.

Pro-Tip: Write short messages in first person for keeping in touch AND longer messages when people need more information from you.

STEP 7: Create a quality signature.

Include a photo of yourself and your contact information (email, phone, website). This will be your channel for driving leads back to you.

Pro-Tip: Add social media buttons into your signature that link to your profiles. Use quality logos and photos, and don't be afraid to experiment.

STEP 8: Automate — Load your campaigns and assign contacts accordingly in a lead nurturing system.

Pro-Tip: Organize your dataase by relationship and you'll never struggle

STEP 9: Nurture your peoplebase on a regular basis.

Pro-Tip: Avoid centering all communication around your service or industry. Think about things you have in common (e.g. your community or general interests) and find ways to generate positive, human interactions. This approach can be as simple as sharing a funny story, making a restaurant recommendation or offering an inspiring twist on a holiday greeting.

STEP 10: When someone responds to you, continue the conversation! :)

Pro-Tip: No matter what type of replies you receive, always send your own reply. Remember, sales happen inside conversations. Our job is to help you have more of them. Call us at 727-232-9117 or book an appointment at happygrasshopper.com/book.

P.S. Don't forget the P.S. Line! It's is a great place to share additional information. If you'd like to chat, just email me at dan@happygrasshopper.com.

Pro-Tip: Use your PS line to share updates on new features or content, offer industry and area recommendations, or add an extra personal touch.

IIf you sell real estate, try "PS - There are a lot of people who'd love to live in your neighborhood. Do you know anyone that's thinking of moving?"