



Selling Disruption™ Show

With Mark S. A. Smith

*Disrupt Sales with Marketing Automation
that Feels Human*

Paul Sokol

Mark S A Smith: What do you get when you combine an engineering nerd with a passion for marketing automation, and then add a pinch of heavy metal? You get my friend Paul Sokol. That's right. He is an engineering nerd just like me, looking at the world in a way of processes, which is required for consistent and persistent disruption of selling. Paul is a geek of the highest cognitive capacity in that he knows how to take that geekdom and turn it into money. Paul wrote the "Infusionsoft Cookbook." If you go on amazon.com and check it out, you'll see that it's the most expensive book about Infusionsoft, and the thickest book about Infusionsoft, and it's the one that can show you how to make money with Infusionsoft. Welcome, Paul.

Paul Sokol: Good morning, Mark. How are you? Thanks for making me blush before I even say anything.

Mark S A Smith: Just a little bit of disruption in the introduction. So how are you using marketing automation to disrupt your customer sales?

Paul Sokol: One of my favorite ways is behavior-based marketing.

Mark S A Smith: Tell us all about it.

Paul Sokol: I don't know if that's a specific term. These days Frank Kern calls it dynamic response marketing. It's just basically the idea of intentionally designing a customer experience for key milestones and paying attention to that. For example, early in the customer journey you're trying to acquire leads, offering a lead magnet. You're familiar with the idea of a lead magnet.

Mark S A Smith: Absolutely.

Paul Sokol: You give away something for free and then you can provide some value, all that jazz. Well, usually it's a very linear, non-sexy thing. It's like going on a date with someone that doesn't actually listen to what you're saying. In most cases you'll, "Here's my name and email," they send you an email, "Hey, here's the e-book," or whatever you requested, and then they just start pounding you with other messages, without even considering if you've even downloaded what you requested. As far as disruption, I take a more intelligent approach to it and follow up with people until they download what they request.

Mark S A Smith: What a great idea. Let's just make sure that they said "yes" to the drink before we buy them another drink.

Paul Sokol: See? He gets it. And that seems so obvious, right? But for whatever reason, and probably just because of the technology, it was just all linear drip, drip, drip, but now we can respond and we can react to that. What I'll usually do is, in this specific tactic, someone requests a lead magnet. Whatever it is, we send an email immediately, of course. "Hey, here it is. Enjoy it. Here's the link to download it." Then if they haven't downloaded it in three days, in the morning, I'll send them a little email that says, "Hey, good morning. Hope you're doing

well. Just want to remind you your thing is still waiting for you. Here's the link." If they still don't download it, four days after that, so making it one full week after they made their initial request, in the afternoon, I'll send a final notice. "Hey, good afternoon. This is your final reminder to request this thing you wanted."

Mark S A Smith: I love it. So you're using a touch of scarcity to drive the behavior that they initially said, "This is something I'm interested in," in the heat of the moment.

Paul Sokol: Mm-hmm (affirmative).

Mark S A Smith: Part of our job as disruptive sales professionals is to keep the heat going, to keep the heat hot.

Paul Sokol: Mm-hmm (affirmative). It also has a second hidden benefit of minimizing spam risk too, because if you're telling people, "This is the last email I'm sending you about this thing," they're going to be less likely to hit the spam button and get you in trouble with the spam police. But you're right, it totally keeps the heat and keeps the flame on. That's just to get them to consume it. We're intentionally building this experience. From the moment that they request it, the next key milestone is that they consume it. We're letting the automation do the tire kicking basically.

Mark S A Smith: Sure. Well, as sales professionals, our job is to keep pinging a customer, keep bugging a customer until they tell us to go away, or "Okay, I'd buy."

Paul Sokol: Absolutely.

Mark S A Smith: We're doing this with an automation standpoint so we can touch people at the time when they're most likely to respond. I know that you use timing as a key part of your secret sauce. Tell me a little more about that.

Paul Sokol: Let's dig into the psychology of what I just shared here. They immediately get an email. It's that immediate gratification. It's what they want, you're being your word. You don't know when that's going to happen necessarily. It can happen in any point in the day.

Mark S A Smith: Wait a second. I want to call something out that you just said that was really important. For you it's a second nature, but I want my listener to get this.

Paul Sokol: Okay. Okay.

Mark S A Smith: The reason why people buy from us is because they trust us to deliver when they give us their money. By going through an experience where we promise them something and then we immediately deliver, that is starting to train them that we are safe and we are trustworthy. It's really important to call out the fact that we promise them something, we are delivering on our promise, what do you want to do next?

Paul Sokol: Thanks for calling that out, Mark, because you're right. That is really important. People are going to buy from you when they know they can trust you, and one of the best ways to establish trust is to say, "I'm going to do something," and then you actually show up as your word. That's why this is very effective for that initial email.

Mark S A Smith: Yeah. Excellent. That is so important. The psychology. Let's do this.

Paul Sokol: Yeah. They receive this immediate email. We're good on our word. Whether they download it or not has nothing to do with this, doesn't really mean anything. What's important is that they're downloading it. If they haven't within three days, that's a pretty reasonable amount of time for somebody to download something you would think, just in the real world, right?

Mark S A Smith: Sure.

Paul Sokol: I know for me, I'll request something and maybe I won't check my email for another day or so.

Mark S A Smith: If we ping something on social media, we may not want to read it on our mobile device. We may want to read it on a larger screen. There's a lot of reasons for us to delay, sure.

Paul Sokol: Exactly, so we have to remember that we're still humans here so we factor that in, so let's give them three days. Especially because this is early in the customer journey, we don't need to be blowing them up every single day. "Hey, you wanted this thing," a couple days later, "Hey, don't forget." We're kind of being cool here, or we're kind of building that good will. We send it in the morning for a couple of reasons. One, so we can start the email by saying, "Good morning," and the timestamp will show in the morning. Right there it feels a lot more personalized and humanized. Also, we know that it's common for people to check their emails in the morning, so why not? I think I usually set it to go at like 8:00 a.m. whatever that person's time zone is.

Mark S A Smith: Ah, yes, their time zone. Important conversation concept here.

Paul Sokol: Mm-hmm (affirmative). Then that's just the second email, that's the reminder to say, "Hey, here's your cool thing."

Mark S A Smith: Before we get to the third thing, you are so good at what you do, Paul. It's awesome, and I want to point out the psychology of sending this thing at 8:30 in the morning their local time. If you send it at 3:00 in the morning, they know it's an automated piece of crap.

Paul Sokol: They do.

Mark S A Smith: But if I send it at a time when a normal human being might be sitting at their computer typing stuff in, even though at some level they know this is automated, it changes the psychology of how they receive it.

Paul Sokol: Absolutely.

Mark S A Smith: The local sending time, it becomes a critical component of generating that trust and disrupting the fact that this is actually an automated sequence. We want the automation to lose its automated feel and become personal.

Paul Sokol: Absolutely. Good automation doesn't feel automated.

Mark S A Smith: That's it.

Paul Sokol: It's like if you go to a play or something. You never notice the sound or the lights if they're doing their job, but if they forget a lighting cue or sound goes off at the wrong time, you're like, "Whoa, hold on a sec."

Mark S A Smith: That's right. I love it. So now let's get to our third point. I love this.

Paul Sokol: Sure. The other thing that it's doing is it's training them on when you're around, so if you're sending an email automatically at 3:00 a.m., people might be expecting to be able to send an email at 3:00 a.m. and expect the reply. By sending it at 8:00 a.m., that's reinforcing normal business hours and again, further, I'm not going to say veil because we don't want to hide the automation, it should be there to enhance the experience and really it's just scaling the relationship. So yeah, it shouldn't feel automated.

Mark S A Smith: That's really good. So marketing automation done right is just an extension of the sales person doing what they would normally do, but doing it using the automation versus them having to bang it out themselves.

Paul Sokol: Absolutely.

Mark S A Smith: As our friend David Garfinkel points out that automation creates the perfect sales person doing the perfect thing at the perfect time.

Paul Sokol: Yes. I like that and we can even extend that as they're doing the perfect thing at the perfect time to the perfect person on the perfect channel. These days channel's becoming even more relevant, knowing when to hit them. I think that's everything we're going to get time to get the second email. Then the third one, that goes out four days after that last one so it's one full week after they opted in, in the afternoon. We can say, "Hey, good afternoon. A week ago your requested this and you still haven't downloaded it." Now, we probably wouldn't want to say it that directly. Unless you were maybe doing a demonstration of an automation system, you'd probably have a little less big brother-y feel to it and do something like, "Hey, about a week ago you requested this and I wanted to make sure you got it." Again, just kind of being that cool person that's there and-

Mark S A Smith: Well, you could use the same language and the same approach if you were sitting here banging out the email, or if you're calling them on the phone. What would you say to them?

Paul Sokol: That's exactly it.

Mark S A Smith: What would you say to them? Well, that's what you say to them.

Paul Sokol: Oh man, that's such a big secret of automation that most people don't get, and my copywriting for automation itself is a niched skill. Doesn't matter if you're going to one person or a million people, it's still individual relationships so every email that you write, even though you know it's going to go to a bunch of people, you should still write it like you're writing it once to that one person. That's the cool thing about automation is that you can be very specific about the things you speak to, and intentionally avoid speaking about things you cannot speak.

Mark S A Smith: Well, the brilliant thing about automation is that we get to identify who this person is, either from the campaign we're running to invite them with a lead magnet, or from information that they share with us, or information that we cross load once we get their information from other services.

Paul Sokol: Absolutely. Yeah, if we know that someone's on Facebook, well we can invite them to follow our page on Facebook.

Mark S A Smith: Once they do, then we have a new level of relationship and we can shift how we interact with them. I think that's really important. For example, one of my products sends out a regular email to support salespeople in their daily activities and I know who they are, I know what they sell. What happens is that I won't send a recommendation for a corporate type of sales tip to somebody who's doing retail sales. Without that level of understanding, the marketing automation is going to send out the same tip to everybody and people go, "Oh, they're not talking to me, and therefore I disconnect the relationship."

Paul Sokol: Exactly.

Mark S A Smith: It's the same thing with everybody. All of us have different people that we sell to that have different motivational sets, different key performance indicators, and different reasons to take action. We have to make sure that we teach them what they need to know that connects with them in that moment. That's what, to me, is the most exciting thing about solid marketing automation.

Paul Sokol: Mm-hmm (affirmative). Connecting with people at that moment where they're engaging and they're interacting. That's the next part of the lead magnet strategy here, which is really cool. I haven't even covered that bit yet. The last thing I'll say about this final email is that it goes out a week later, and again, it happens in the afternoon because maybe they don't open their email in the mornings. Let's try hitting them late afternoon, 3:00, 3:30. We're just trying to cast the widest

net possible to get them to download what they requested in the first place. You got to remember, this entire time they said, "Here's my information. Send this to me." Let's try and feed it to them. Let's lead the horse to water and put a straw in his mouth and tell them crank up the heat, you know?

Mark S A Smith: Yeah, I love it.

Paul Sokol: Perfectly piggybacking off what you said of having the right messaging at the right time is the follow up of the lead magnet. Again, this is something that I can't necessarily say I invented. I know that I've been doing it for many, many years, and I'll share with you a story of why I love it, but it's very simple. Mark, you request this lead magnet, you get these emails, you download it. One day later when you download it, regardless of when you actually download it, one day later, that next morning, is just a light touch follow up email that says, "Hey, thanks for checking out blah. Did you have any questions?" Or maybe ask a more precise thing. "Hey, you know, I spoke about this on number four. I want to this about more today. Did you have any questions?"

Mark S A Smith: Yeah, that's really good because it gives a chance to resell the read.

Paul Sokol: Right. It absolutely does, even if they never download it, which is the neat part that's a chain on to this tactic, but yes.

Mark S A Smith: Sure. One of the strategies that we taught about in the book "Guerrilla TeleSelling" many, many years ago was when you call somebody up and you say, "Remember that thing you asked me to send you? What did you like best about it?" You assume that they did the read.

Paul Sokol: Right.

Mark S A Smith: This is an extension of that. I really love it. It's along the lines of, "If you read this, you probably remember reading about this point." If they haven't, it resells the read, and if they have, it reinforces the read, both of which moves us down the customer journey exactly how we want them to move to take the next step. Brilliant.

Paul Sokol: Yes, and it also is further positioning you as that expert and the authority, which is what any kind of good lead magnet or content should do. It should keep pointing to you as the ideal solution for whatever their problem is.

Mark S A Smith: Mm-hmm (affirmative). Right. Of course we talk about that in Selling Disruption. The whole idea for selling high margin products is to be the authority. You have to be the expert when you're going to get that level of margin out of your customers, so well said. Excellent. Carry on.

Paul Sokol: This is again just simulating a real relationship, and that's really all that automation is, because this would be kind of real life. If I were to send you something, Mark, and be like, "Hey, check out this cool PDF," I may not be able

to track that you're actually downloading it because I'm using Gmail or whatever, but I would very much send an email the next day and be like, "Hey, what'd you think? Was that cool?" With marketing automation we can do that, and make it timely and relevant, because it's always with respect to when they take action. If they download it immediately on that first email, cool, they get it the very next day. If they drag their feet for two weeks and then they finally download it, okay, well it goes out the next day. Here's my story about this tactic and why I love it, Mark.

Mark S A Smith: I love it. Bring it on.

Paul Sokol: Back in the day when I was working on Infusionsoft as a success coach, when I first started so this was probably around, I don't know, 2011, 2012. My job was to help people get going with Infusionsoft when they bought. Okay, no problem. Was working with a lady, high-end B2B services, a magnitude of thousands, longer-ish buying cycle. It's a boutique service for branding. She had an e-book and we built this kind of mechanism, but it was even simpler. There was an email that went out immediately delivering it, and then there was an email one week later that said, "Hey, remember to download it," and that was it. Then there was the email that next morning if they did download it that says, "Hey, what do you think?"

Here's the story. We get this built halfway through our coaching calls, so she throws it on her website. Cool. One lady randomly opts in without any promotion or whatnot. She just happened to be on my client's site, saw it, okay. She opted it. Viole! She didn't download the e-book. All right, no worries. On the next coaching call, she tells me that the one week reminder went out to this lady and she downloaded the e-book as she was instructed, and she loved it, and then the next day when my client just "happened" to email her saying, "What did you think about it?" this lady was so impressed that she replied, and immediately became a multi-thousand dollar client, just because of this one tactic.

Mark S A Smith: Yeah, just instant response.

Paul Sokol: Yeah, so that funnel had like 100% conversion rate for like two weeks that we were working together, and obviously since then more people have gone into it. But she was shocked that someone was paying attention to her, and that's why she ended up choosing my client to work with her. It's not rocket science. That's the crazy thing.

Mark S A Smith: No, it's not.

Paul Sokol: It's actually really simple. Some of the most elegant-

Mark S A Smith: It's an elegant solution.

Paul Sokol: Mm-hmm (affirmative).

Mark S A Smith: Well, the reality is that when it comes to a person purchasing a product, when there's competition, the competitive race isn't who's best. It's who can get to understanding fastest.

Paul Sokol: Yeah, absolutely.

Mark S A Smith: Yeah, and marketing automation allows us the opportunity to create understanding faster by interacting in an intelligent fashion with our customers so that they show us their level of understanding through the sequence of the customer journey, and that creates selling disruption.

Paul Sokol: Oh, yeah. Now you can go into the standard sales drip. But think about that. You've established the relationship and respected it. It's not until they actually jump through two hoops that you start laying it on a little thicker, trying to drive an appointment or whatever is the next step in the journey. The advance tactic that I briefly hinted at earlier is that even if they never download it, you can send them follow up emails and it's a similar content. It just addresses the fact that they never downloaded. That's okay, we're not admonishing them or making them wrong. We're just, "Hey, it looks like you're busy. You don't have time to read this. Cool. I still wanted to follow up with you because on page two I spoke about blah. I want to talk more about that today." It's basically the same email as what would have happened if they had downloaded.

Mark S A Smith: Yeah, and I think the great aspect of that, Paul, is that we make some decisions in the heat of the moment. Something triggers us and says, "Oh, this looks great. This can solve a problem. This can help me realize a dream." Frequently we will make a call, we will make a touch, and then something cools off, or we get surrounded by alligators, or we don't have the money to buy it today, or for a thousand different reasons, the person cools off. Yet the fact that they found it interesting to begin gives you a high probability of success with that person over the long haul. Marketing automation allows us to keep the fire going until they're ready.

One of my favorite phrases with customers that said, "I want to talk," and then they cool off and we can't get ahold of them is, I send them a mail says, "Just want you to know I'm ready when you are, but not until." They always laugh when I say that, because they get it. They get it that I'm there when they have made that decision, "This is now a priority." Management of priorities is one of the key secrets to selling disruption. Paul, this has been awesome. What a great conversation. What do you have for our listener today? You've got more goodness to share with them, don't you?

Paul Sokol: What I've done, Mark, and thanks for having me today, is I've assembled some strategies for disruptive selling and how it can be used with marketing automation. It's "Three Engagement Hacks for Stealth Selling."

Mark S A Smith: Yes, I've seen them. They're absolutely worth the read.

Paul Sokol: They are, and you'll actually get to see a little bit of what I've spoken about in today's call, because of course, I do practice what I preach, so there's some of that behavior-based stuff in there.

Mark S A Smith: I love it. Excellent. So the way that you get that sequence, and the way that you get that information is to go to the show page and click on the link that we have there which is going to be, "Sign me up for Paul's sequence and Selling Disruption hacks using marketing automation" and you'll get right on his list. You'll really enjoy it. I guarantee you, you will find that to be extraordinary. You can also go to the show page, you'll find the link for Paul's "Infusionsoft Cookbook." I've been digging into it and learning a ton of things, and I can't wait to apply it to some of the sales chains I have in mine. Thank you, Paul for being my guest. It's always a delight, my friend. I think we're going to probably do this again sometime in the near future.