

Marketing Strategy VVP

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A CMO at a SaaS company typically focuses on generating high-quality leads through a **mix of inbound and outbound marketing strategies**, leveraging various marketing channels and tools. Here's a structured approach to developing a lead generation and marketing strategy for Value Viewpoint:

1. Ideal Customer Profile (ICP) & Lead Types

For Value Viewpoint, the target leads are likely:

- Tech Sales Leaders (VPs of Sales, CROs, Sales Ops, Sales Directors)
- Startup Founders & Founding Sales Teams
- Value Engineers & Sales Engineers
- Customer Success Leaders
- Product Marketers
- Consulting & Advisory Firms focused on Sales Enablement

Leads can be classified as:

1. Lead Types & Target Audience

Lead Type	Description	Ideal Target
Marketing Qualified Leads (MQLs)	Prospects engaging with content but not yet sales-ready.	Tech Sales Leaders, Value Engineers, Product Marketers. (Source)
Sales Qualified Leads (SQLs)	Actively seeking a sales enablement/ROI solution.	VP of Sales, Sales Directors, SDR Managers, CROs.
Product Qualified Leads (PQLs)	Users who engaged with Value Viewpoint's features.	Startups, enterprise sellers, customer success teams.

MQLs, SQLs, and PQLs are key stages in the sales and marketing funnel that help categorize and prioritize leads based on their level of engagement and readiness to buy. Here's a breakdown of each term:

1. MQL (Marketing Qualified Lead)

Definition: A lead that has shown interest in your product or service based on their engagement with marketing efforts but is not yet ready for direct sales outreach.

Characteristics:

- Engaged with marketing content (e.g., downloaded a whitepaper, attended a webinar, or visited pricing pages).
- Fits your target audience or ideal customer profile (ICP).
- Demonstrates intent but may not have a clear buying timeline or budget.

How It's Identified:

- Lead scoring models (e.g., based on website visits, email opens, or content downloads).
- Behavioral and demographic data.

Next Step: Handed off to the sales team for further qualification or nurturing.

2. SQL (Sales Qualified Lead)

Definition: A lead that has been vetted by the sales team and is deemed ready for direct sales engagement.

Characteristics:

- Has a clear need or pain point that your product/service can address.
- Has budget, authority, need, and timeline (BANT criteria).
- Actively engaging with sales reps (e.g., scheduling calls, requesting demos).

How It's Identified:

- Further qualification by the sales team after initial marketing engagement.
- Direct conversations with the lead to assess their readiness to buy.

Next Step: Moved into the sales pipeline for direct outreach and conversion into an opportunity.

3. PQL (Product Qualified Lead)

Definition: A lead that has experienced value from your product (often through a free trial, freemium model, or limited usage) and is likely to become a paying customer.

Characteristics:

- Actively using your product or service.
- Demonstrates engagement with key features or workflows.
- Shows signs of reaching usage limits or needing advanced functionality.

How It's Identified:

- Product usage data (e.g., frequency of use, feature adoption, or reaching trial limits).
- Behavioral signals indicating readiness to upgrade or purchase.

2. Marketing Channels & Lead Generation Tactics

Channel	Strategy	Execution Tactics
Content Marketing & SEO	Attracts inbound leads via blogs, case studies, and industry insights.	<ul style="list-style-type: none">- Blog posts on value-based selling, ROI modeling, tech sales.- SEO optimization targeting keywords like "ROI modeling SaaS".- Case studies showing real business case success stories.

Webinars & Thought Leadership	Positions Value Viewpoint as an expert in sales enablement.	<ul style="list-style-type: none"> - LinkedIn Live sessions on "How to Build a Winning Business Case." - Inviting Value Engineers from Salesforce, AWS, ServiceNow.
Email Marketing & Lead Nurturing	Automates engagement and education for warm leads.	<ul style="list-style-type: none"> - Drip campaigns offering free templates, guides, and ROI insights. - Retargeting users with personalized case study emails.
LinkedIn Outreach	Direct engagement with sales enablement and value engineers.	<ul style="list-style-type: none"> - Using LinkedIn Sales Navigator for outreach to Sales Leaders. - Personalized DMs and connection requests.
Cold Email Outreach	Direct outbound engagement targeting decision-makers.	<ul style="list-style-type: none"> - Cold emails offering free business case assessments. - Providing value-driven insights to Series A-C startups & enterprise sellers.
Paid Ads (PPC)	Targeted ads for high-intent leads.	<ul style="list-style-type: none"> - LinkedIn Ads targeting SaaS sales & RevOps professionals. - Google retargeting ads for site visitors.
Product-Led Growth (PLG)	Encouraging self-service adoption of the platform.	<ul style="list-style-type: none"> - Free trial + guided onboarding tours showcasing ROI features. - Viral sharing options for generated business cases.
Community & Partner Growth	Establishes credibility via ecosystem partnerships.	<ul style="list-style-type: none"> - Engaging in Sales Hacker, Modern Sales Pros, Pavilion. - Partnering with RevOps consultants & value engineering firms.

3. Marketing Tech Stack & Tools

Category	Tools Used
CRM & Automation	HubSpot, Salesforce, Apollo.io
SEO & Content	Ahrefs, SEMrush, Jasper (AI-powered content creation)
Webinar & Event Hosting	Zoom Webinars, LinkedIn Live, Demio
Email & Outreach	Apollo.io, LinkedIn Sales Navigator, Clay.com
Analytics & Tracking	Google Analytics, Hotjar, Heap

Paid Advertising & Retargeting	Google Ads, LinkedIn Ads, Meta Ads
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4. Key Performance Metrics (KPIs)

Category	Key Metrics to Track
Lead Generation	MQLs, SQLs, PQLs growth rate, Cost per Lead (CPL), Cost per Acquisition (CPA)
Engagement	Website traffic, blog engagement, webinar attendance, email open rates
Conversion	Free trial to paid conversion rate, lead-to-demo conversion rate, deal close rate

Marketing Channels & Lead Generation Tactics

1. Content First: Publish SEO-optimized blogs & LinkedIn thought leadership posts.
2. Webinar & Lead Magnets: Host a free session on business case automation.
3. Email Marketing & Lead Nurturing
4. LinkedIn Outreach: Start targeted messaging to Sales Leaders & Value Engineers.
5. Cold Email Testing: Launch an outbound sequence offering a Value Review session.
6. Paid Ads Experimentation: Run LinkedIn Ads to SaaS sellers & startup founders.
7. Product Led Growth
8. Community & Partner Growth

Marketing Channels & Lead Generation Tactics

Channel	Strategy	Execution Tactics	Who in VVP is Responsible?	Campaign Metrics	Lead Type & SDR Actions	Tools for SDR (MQL Intake, Follow-up, Qualification, AE Handoff)
Content Marketing & SEO	Attract inbound leads via blogs, case studies, and industry insights.	- Blog posts on value-based selling, ROI modeling, tech sales. - SEO optimization targeting keywords like " ROI modeling SaaS ". - Case studies showing real business case success stories.	Content Writer & SEO Specialist	Organic traffic, engagement rate, form submissions	MQL → SDR reaches out to nurture leads into a demo.	HubSpot (MQL intake), Apollo.io (Follow-up), Outreach.io (Qualification), Salesforce (AE Handoff)
Webinars & Thought Leadership	Positions Value Viewpoint as an expert in sales enablement.	- LinkedIn Live sessions on " How to Build a Winning Business Case. " - Inviting Value Engineers from Salesforce, AWS, ServiceNow.	Marketing Manager & Event Coordinator	Registrations, attendance rate, demo requests	MQL → SQL → SDR follows up to schedule demo.	Zoom (Webinars), HubSpot (MQL intake), LinkedIn Sales Navigator (Follow-up), Outreach.io (Qualification), Salesforce (AE Handoff)
Email Marketing & Lead Nurturing	Automates engagement and education for warm leads.	- Drip campaigns offering free templates, guides, and ROI insights. - Retargeting users with personalized case study emails.	Email Marketing Specialist	Open rate, click-through rate, conversion rate	MQL → SQL → SDR qualifies and schedules call with AE.	HubSpot (MQL intake), Apollo.io (Follow-up), Outreach.io (Qualification), Salesforce (AE Handoff)
LinkedIn Outreach	Direct engagement with sales enablement and value engineers.	- Using LinkedIn Sales Navigator for outreach to Sales Leaders. - Personalized DMs and connection requests.	SDRs	Connection requests accepted, response rate, meeting booked	SQL → SDR books a call, transitions to AE.	LinkedIn Sales Navigator (Follow-up), Apollo.io (Qualification), Salesforce (AE Handoff)

Cold Email Outreach	Direct outbound engagement targeting decision-makers.	- Cold emails offering free business case assessments . - Providing value-driven insights to Series A-C startups & enterprise sellers .	SDRs & Sales Ops	Open rate, reply rate, meetings booked	SQL → SDR engages, qualifies, and transitions to AE.	HubSpot (MQL intake), Apollo.io (Follow-up), Outreach.io (Qualification), Salesforce (AE Handoff)
Paid Ads (PPC)	Targeted ads for high-intent leads.	- LinkedIn Ads targeting SaaS sales & RevOps professionals . - Google retargeting ads for site visitors.	Performance Marketer	Cost per lead (CPL), click-through rate (CTR), conversion rate	MQL → SQL → SDR follows up, qualifies, and schedules demo.	Google Ads (MQL intake), HubSpot (Follow-up), Apollo.io (Qualification), Salesforce (AE Handoff)
Product-Led Growth (PLG)	Encouraging self-service adoption of the platform.	- Free trial + guided onboarding tours showcasing ROI features . - Viral sharing options for generated business cases .	Product & Growth Team	Free trial sign-ups, activation rate, PQL conversion rate	PQL → SQL → SDR follows up and nurtures for conversion.	Intercom (MQL intake), HubSpot (Follow-up), Apollo.io (Qualification), Salesforce (AE Handoff)
Community & Partner Growth	Establishes credibility via ecosystem partnerships.	- Engaging in Sales Hacker, Modern Sales Pros, Pavilion . - Partnering with RevOps consultants & value engineering firms .	Partnership Manager & Community Manager	Partner-generated leads, engagement, referrals	MQL → SQL → SDR follows up and transitions to AE if needed.	HubSpot (MQL intake), LinkedIn Sales Navigator (Follow-up), Outreach.io (Qualification), Salesforce (AE Handoff)

1. LinkedIn Outreach Messages

These messages are personalized for Sales Leaders, Value Engineers, and SaaS Founders.

1.1 Connection Request Message

Subject: Love Your Work at [Company] – Let's Connect!

Hi [First Name],

I came across your work at [Company] and wanted to reach out. At [Your Company], we help SaaS sales teams improve their SQL conversion rates by up to 96% through a Personalized Executive Report. This top-management consultancy quality report is powered by AI-driven research using publicly available data to:

- Identify key pain points,
- Define clear business benefits, and
- Provide high-level ROI estimates.

We call this the Value Discovery Process, and it's designed to help sales teams accelerate deal closures with value-personalized outreach.

I'd love to exchange insights on how this approach could benefit your team. Would you be open to connecting? Looking forward to your thoughts!

Best regards,

[Your Full Name]

[Your Job Title]

[Your Company]

[Your LinkedIn Profile Link]

Why This Works:

1. Personalized Opening: Acknowledges their work and establishes relevance.
 2. Clear Value Proposition: Highlights the specific benefit (96% improvement in SQL conversion rates).
 3. Concise and Actionable: Explains the offering briefly and ends with a clear call-to-action.
 4. Professional Tone: Maintains a respectful and engaging tone without being overly salesy.
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1.2 Follow-Up After Connection

(For Sales Leaders / CROs / VP Sales)

Hi [First Name],

Thanks for connecting! I see that [Company] is scaling, and I imagine demonstrating ROI to prospects is key to shortening your sales cycle.

At Value Viewpoint, we help tech sales teams automate business case creation—making it easier for buyers to justify investments.

Would love to share insights and see if it aligns with your team's sales motion. Up for a quick chat?

(For Value Engineers / Sales Engineers)

Hi [First Name],

Great to connect! Given your role in Value Engineering, I figured you might find this interesting—our platform automates ROI modeling and business case creation for sales teams.

Would love to hear how your team approaches value quantification. Open to a quick chat this week?

(For Startup Founders)

Hi [First Name],

I know how tough it is for startups to get buyers to commit. We built Value Viewpoint to help founders articulate their tech's business value—like a "sales business case automation" tool. Would love to share a quick walkthrough. Open to a quick chat?

2. Cold Email Templates

2.1 Email for Sales Leaders (VP Sales / CROs)

Subject: Helping [Company] Close Deals Faster with Value Selling

Hi [First Name],

I noticed [Company] is growing, and I imagine accelerating sales cycles is a top priority. A big challenge we see in SaaS sales is getting buyers to see quantifiable business value upfront—often delaying decisions.

That's why we built Value Viewpoint, an AI-powered platform that automates business case creation, helping sales teams justify deals faster and close up to 96% more opportunities.

I'd love to show you how it works—can we find 15 minutes this week?

Best,
Val

2.2 Email for Value Engineers / Sales Engineers

Subject: Automating ROI Modeling for [Company]

Hi [First Name],

I know how much time goes into building business cases and ROI models for sales opportunities. We built Value Viewpoint to automate this process—instantly generating value reports tailored to each prospect.

Our platform is designed for sales teams and value engineers who want to scale impact without spending hours on Excel or PowerPoint.

Would love to give you a quick walkthrough—open to a 15-minute chat?

2.3 Email for Startup Founders

Subject: Making It Easier for Startups to Win Deals

Hi [First Name],

One of the biggest challenges for startups is convincing buyers of the ROI behind your tech. We built Value Viewpoint as an automated tool to create business cases in minutes, helping startups sell faster by showing real financial impact upfront.

If you're curious, I'd be happy to share a quick walkthrough—would a quick 15-minute chat work?

3. Landing Page Funnel for Lead Capture

The goal of the landing page is to convert visitors into leads with a compelling offer.

3.1 Landing Page Structure

Hero Section (Above the Fold)

- **Headline:**
“Close More Deals with AI-Driven Business Cases”
- **Subheadline:**
Value Viewpoint automates ROI modeling & business case creation—helping tech sales teams win more deals faster.
- **CTA:**
 - “Try it Free” (Signup)
 - “Get a Demo” (Lead Capture Form)

3.2 Social Proof (Trust-Building)

- Logos of notable companies using Value Viewpoint.
- Testimonials from Sales Leaders, Value Engineers, or Founders.

3.3 Key Benefits Section

- Automated Business Case Creation – Generate reports in minutes.
- Win More Deals – Increase conversion rates by up to 96%.
- Justify ROI Instantly – Tailored financial impact calculations.

3.4 Lead Magnet (Optional)

- "Download a Free Business Case Template" → Captures emails for nurture campaigns.

3.5 CTA Reiteration

- Try Value Viewpoint Now – Free Trial
- Book a Demo – See It in Action

4. Next Steps

1. Deploy LinkedIn Outreach → Automate messages using LinkedIn Sales Navigator & Apollo.io.
2. Run Email Outreach → Test subject lines and optimize response rates.
3. Build & Optimize Landing Page → Capture leads with a compelling free trial/demo offer.
4. Experiment with Retargeting Ads → Use LinkedIn & Google Ads to nurture interested visitors.

Would you like me to draft the landing page copy in a structured format for easy deployment? 🚀

You said:

Yes

ChatGPT said:

Here's a structured landing page copy for Value Viewpoint that you can use for lead generation and conversion. This follows a high-converting SaaS landing page framework designed to capture leads effectively.

Value Viewpoint Landing Page Copy

1. Hero Section (Above the Fold)

Headline (H1):

Close More Deals with AI-Driven Business Cases

Subheadline:

Tech sales teams struggle to justify ROI. Value Viewpoint automates business case creation, helping you win more deals, faster.

Call to Action (CTA) Buttons:

 [Try for Free] → Free signup, no credit card required

 [Book a Demo] → Request a live walkthrough

2. Social Proof / Trust-Building Section

[Insert Logos of SaaS or Tech Companies that Trust Value Viewpoint]

"We closed deals 2X faster by showing buyers the ROI upfront."

— [Testimonial from a Sales Leader or Founder]

3. Pain Points & Solution Section

The Problem:

-  Buyers delay decisions because they don't see clear ROI.
-  Sales teams waste time manually building business cases.
-  Deals get stuck because financial impact isn't quantified.

The Solution:

 Value Viewpoint automates business case creation, making it easy to prove ROI and accelerate deals.

4. How It Works (3-Step Process)

- ◆ Step 1: Enter your product and customer details.
- ◆ Step 2: AI auto-generates a tailored business case & ROI model.
- ◆ Step 3: Share the case with your buyer to accelerate the deal.

 Try it now → [Get Started for Free]

5. Key Benefits Section

| 🚀 Automated Business Cases | Generate reports in minutes, not hours. | | 🏆 Win More Deals | Increase conversion rates by 96%. | | 📊 Instant ROI Justification | Tailored financial impact calculations. |

📊 Experience the power of Value Viewpoint today.

✅ [Try for Free]

✅ [Book a Demo]

6. Call-to-Action Reiteration + Lead Magnet

📁 Bonus: Get a Free Business Case Template!

✉️ Download our "Sales Business Case Framework" and start showing ROI today.

✅ [Download Free Template]

OR

✅ [Try Value Viewpoint Now]

7. Final Trust-Building Section (FAQs)

Q: Who is Value Viewpoint for?

A: Sales teams, Value Engineers, SaaS Founders, and anyone needing to justify ROI quickly.

Q: How much time does it take?

A: You can generate a complete business case in minutes using AI.

Q: Can I try it for free?

A: Yes! Start with a free trial—no credit card required.

✅ [Try for Free] → Start closing more deals today!

8. Footer (Legal & Additional Info)

📍 Value Viewpoint, Inc. | Sales Enablement SaaS

🔗 Privacy Policy | Terms of Service

✉️ Contact Us: [your email]

Next Steps

Would you like me to draft the email sequences for the free trial users to convert them into paying customers?



Yes

🚀 Free Trial to Paid Conversion Email Sequence

Email #	Trigger	Subject Line	Goal
1. Welcome Email	Immediately after signup	Welcome to Value Viewpoint – Start Closing More Deals Today	Get users to take the first action inside the platform.
2. Feature Highlight	Day 2	Your First Business Case is 3 Clicks Away!	Encourage engagement with a quick start guide.
3. Social Proof & Success	Day 4	How [Company X] Closed 2X More Deals Using Value Viewpoint	Showcase customer success stories & ROI.
4. Trial Expiry Reminder #1	5 days before trial ends	Your Free Trial Ends Soon – Don't Lose Your Business Cases!	Create urgency and encourage conversion.
5. Trial Expiry Reminder #2	1 day before trial ends	Last Chance: Keep Access to Your Business Cases	Final push to upgrade before expiration.
6. Post-Trial Follow-Up	3 days after trial ends (if no conversion)	Still Deciding? Get 7 More Days Free!	Offer an extension or discount.

 Email #1 – Welcome Email

 Sent: Immediately after signup

 Goal: Encourage users to take the first action inside the platform.

Subject:  Welcome to Value Viewpoint – Start Closing More Deals Today

Body:

Hi [First Name],

Welcome to Value Viewpoint! You're now one step closer to closing more deals faster with automated business cases.

 Here's how to get started:

 Create your first business case – [\[Click Here\]](#)

- 2 Choose your industry & technology
- 3 Get a tailored ROI model in minutes!

Your free trial is active for [X] days, so let's get you up and running fast.

Need help? Book a free onboarding call here → [Schedule Demo]

Happy selling,
Val & The Value Viewpoint Team

 Email #2 – Feature Highlight

 Sent: Day 2

 Goal: Get users to generate their first business case inside the platform.

Subject: Your First Business Case is 3 Clicks Away!

Body:

Hi [First Name],

Did you know that sales teams using Value Viewpoint close 96% more deals? Now it's time to create your first automated business case.

 It takes just 3 clicks!

 Select your industry

 Input a few deal details

 Generate your custom business case & ROI report

 Start Now → [Create Your First Business Case]

Let me know if you need help!

Best,
Val

 Email #3 – Social Proof & Success Story

 Sent: Day 4

 Goal: Show real-world ROI & get users engaged.

Subject: How [Company X] Closed 2X More Deals Using Value Viewpoint

Body:

Hi [First Name],

What if your sales team could close deals 2X faster just by presenting a clear ROI case to buyers?

 [Company X] did exactly that with Value Viewpoint.

- Challenge: Their deals were stalling due to ROI uncertainty.
- Solution: They used automated business cases to prove the financial impact.

- Result: Deal velocity increased, and their close rate improved by 96%!

 Now it's your turn → [Create Your First Business Case]

Let me know if you'd like a quick 1:1 walkthrough.

Best,
Val

 Email #4 – Trial Expiry Reminder #1

 Sent: 5 days before trial ends

 Goal: Create urgency to encourage conversion.

Subject:  Your Free Trial Ends Soon – Don't Lose Your Business Cases!

Body:

Hi [First Name],

Time flies! Your free trial of Value Viewpoint ends in 5 days.

Without access, you'll:

-  Lose saved business cases & ROI reports
-  Miss out on automated sales acceleration
-  Go back to manual Excel models (ugh!)

But you can keep closing deals faster with a quick upgrade.

 [Upgrade Now] (Get 20% off if you upgrade today!)

Let me know if you need more time!

Best,
Val

 Email #5 – Trial Expiry Reminder #2 (Final Warning)

 Sent: 1 day before trial ends

 Goal: Final push before the trial expires.

Subject:  Last Chance: Keep Access to Your Business Cases!

Body:

Hi [First Name],

Your free trial ends in 24 hours.

 If you don't upgrade, you'll lose:

-  Your automated business case reports
-  Access to instant ROI modeling
-  The ability to close more deals, faster

But you can keep it all—just upgrade now.

✓ [Upgrade Now & Keep Your Access]

Have questions? Reply, and I'll help!

Best,
Val

✉ Email #6 – Post-Trial Follow-Up (Reactivation Offer)

📅 17 Sent: 3 days after trial ends (if no conversion)

📌 Goal: Bring users back with an extension or discount.

Subject: Still Deciding? Get 7 More Days Free!

Body:

Hi [First Name],

I noticed your Value Viewpoint trial ended—but I don't want you to miss out!

🚀 Let's extend your trial for 7 more days—completely free.

📊 That way, you can fully experience automated business case creation and see how it helps you close deals faster.

Click below to reactivate your account:

✓ [Extend My Trial for Free]

See you inside,
Val

Value Viewpoint Pricing Page Copy

1. Hero Section (Above the Fold)

Headline (H1):

💡 Choose a Plan That Helps You Close More Deals

Subheadline:

Automate business case creation, justify ROI instantly, and win more deals—faster.

✓ Start for Free – No Credit Card Required

📌 [Get Started Free] → Immediate signup

📌 [Book a Demo] → Request a walkthrough

2. Pricing Plans Table (Side-by-Side Format)

Plan	Starter (Free Trial) 	Pro  (Best for Teams)	Enterprise  (Custom)
Who It's For	Individual sales reps & founders testing the platform	Sales teams looking to scale ROI-driven selling	Enterprises needing full customization & integrations
Business Case Automation	✓	✓	✓
AI-Generated ROI Models	✓	✓	✓
Customizable Reports	✗	✓	✓
Team Collaboration	✗	✓	✓
CRM Integration	✗	✓	✓
White-Labeled Reports	✗	✗	✓
Custom AI Insights	✗	✗	✓
Support	Email	Priority Email & Chat	Dedicated CSM
Pricing	Free for 7 days	\$XX/user/mo	Custom Pricing

 [Try Free] → No credit card required

 [Book a Demo] → Talk to Sales

3. Why Choose Value Viewpoint? (Differentiation Section)

 Automated Business Case Creation – No more manual Excel models.

 Close More Deals – Increase conversion rates by 96%.

 Instant ROI Justification – Financial impact modeling in minutes.

 [Start Free Today]

4. FAQs (Addressing Pricing Objections)

Q: What happens when my free trial ends?

A: You can upgrade to Pro or Enterprise to keep access to your business cases.

Q: Can I cancel anytime?

A: Yes! There are no long-term contracts—cancel anytime.

Q: Do you offer a money-back guarantee?

A: Yes! If you don't find value in 30 days, we'll refund your first payment.

 [Try for Free] → No risk, all reward!

5. Final CTA Section

 Ready to Close More Deals with AI-Driven Business Cases?

- ◆ [Try for Free] – No credit card required
- ◆ [Book a Demo] – See it in action

 Get started today & win more deals!

Next Steps

Would you like me to create checkout page copy & onboarding messaging for users who upgrade? 😊

Here's the checkout page copy & onboarding messaging for users who upgrade to a paid plan on Value Viewpoint. This ensures a seamless transition from free trial to paid user, increasing retention and engagement.

Checkout Page Copy

1. Checkout Page Structure

Headline (H1):

 You're One Step Away from Closing More Deals!

Subheadline:

Upgrade now and get full access to AI-driven business cases, instant ROI models, and team collaboration tools.

- ✓ Fast, secure checkout
- ✓ 30-day money-back guarantee
- ✓ No long-term commitment—cancel anytime

- 📌 [Upgrade to Pro] → Monthly or Annual Plan
 - 📌 [Talk to Sales] → Enterprise Custom Pricing
-

2. Secure Payment Section

🔒 Secure Payment – We Accept All Major Cards & PayPal

Plan: ✓ Pro Plan – \$XX/user/month

📌 Enterprise? [Contact Sales]

👉 [Upgrade Now] (CTA Button)

💡 100% Risk-Free: Not satisfied? Get a full refund within 30 days.

3. Post-Purchase Confirmation Page

Headline: ✓ You're All Set!

Subheadline: Welcome to Value Viewpoint Pro! Your account is now upgraded.

🚀 Here's what to do next:

- 1 Create Your First Business Case → [Start Now]
- 2 Watch a Quick Start Video → [Watch Now]
- 3 Invite Your Team → [Add Users]

✉️ A confirmation email with your receipt & onboarding guide is on its way.

Need help? Contact [Support] anytime.

📌 [Go to Dashboard] (CTA Button)

✉️ Onboarding Email Sequence for Paid Users

Email #	Trigger	Subject Line	Goal
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1. Welcome Email	Immediately after upgrade	Welcome to Value Viewpoint Pro! Let's Get Started 🚀	Guide users to take their first action.
2. Quick Win Email	Day 2	Your First Business Case is Waiting!	Encourage users to generate & share a business case.
3. Feature Adoption Email	Day 5	Boost Your Sales with These Hidden Features	Educate users on team collaboration & CRM integration.
4. Engagement Email	Day 7	Need Help? Join Our Live Training!	Offer live onboarding or video tutorials.
5. Success Story Email	Day 10	How [Company X] 2X'd Their Sales with Value Viewpoint	Reinforce social proof & success metrics.

✉ Email #1 – Welcome Email

📅 Sent: Immediately after upgrade

🎯 Goal: Guide users to first action inside the platform.

Subject: 🚀 Welcome to Value Viewpoint Pro! Let's Get Started

Body:

Hi [First Name],

🎉 Congrats on upgrading to Value Viewpoint Pro! You now have access to AI-powered business case automation, instant ROI models, and collaboration features.

✅ Here's how to get started in less than 5 minutes:

- 1 Create Your First Business Case → [Start Now]
- 2 Invite Your Team to collaborate → [Add Users]
- 3 Watch a Quick Start Guide → [Watch Now]

Need help? Book a free 1:1 onboarding session → [Schedule Here]

Happy selling! 🚀

Val & The Value Viewpoint Team

 Email #2 – Quick Win Email

 17 Sent: Day 2

 Goal: Get users to generate & share their first business case.

Subject: Your First Business Case is Waiting!

Body:

Hi [First Name],

Did you know that sales teams using Value Viewpoint close 96% more deals?

If you haven't created your first business case yet, now's the time! It only takes 3 clicks:

 Select your industry

 Input a few deal details

 Get a custom business case & ROI report

 Try it now → [Create Business Case]

Have questions? Reply to this email, and I'll personally help!

Best,

Val

 Email #3 – Feature Adoption Email

 17 Sent: Day 5

 Goal: Encourage adoption of team collaboration & CRM integration.

Subject: Boost Your Sales with These Hidden Features

Body:

Hi [First Name],

Now that you've started using Value Viewpoint, let's take it to the next level.

 Did you know you can:

 Invite your team and collaborate on business cases?

 Sync with your CRM to streamline workflows?

 Customize ROI reports for each prospect?

 Unlock these features now → [Explore More]

Need help? Book a 15-min strategy session → [Schedule Here]

Best,

Val

 Email #4 – Engagement Email

 17 Sent: Day 7

 Goal: Encourage participation in live onboarding or video tutorials.

Subject: Need Help? Join Our Live Training!

Body:

Hi [First Name],

Want to learn how to close deals faster using Value Viewpoint? Join our live training where we'll walk through:

 How to create winning business cases in minutes

 Proven ROI strategies for sales success

 Live Q&A – Get answers to your questions!

 [Reserve Your Spot] → Limited seats available!

See you there! 

Val

 Email #5 – Success Story Email

 17 Sent: Day 10

 Goal: Reinforce social proof & encourage engagement.

Subject: How [Company X] 2X'd Their Sales with Value Viewpoint

Body:

Hi [First Name],

What if your sales team could close deals 2X faster just by showing clear ROI to buyers?

 [Company X] did exactly that with Value Viewpoint.

- Challenge: Their deals were stalling due to ROI uncertainty.
- Solution: They used automated business cases to prove the financial impact.
- Result: Deal velocity increased, and their close rate improved by 96%!

 Now it's your turn → [Create Your Next Business Case]

Let me know if you'd like a quick 1:1 session.

Best,

Val

 Next Steps

Would you like me to create a cancellation prevention email sequence to retain users who try to cancel? 😊

Cancellation Prevention Email Sequence

Email #	Trigger	Subject Line	Goal
1. Immediate Retention Offer	User clicks "Cancel Subscription"	Wait! Before You Cancel, Here's an Exclusive Offer	Prevent cancellation by offering a discount or pause option.
2. Customer Feedback Request	1 day after cancellation request	Quick Question: What Went Wrong?	Collect feedback & offer alternatives.
3. Final Offer & Extension	3 days after cancellation request	Still Thinking? How About 30 More Days Free?	Give them an incentive to stay.
4. Win-Back Email	30 days after cancellation	We Miss You! Here's 50% Off If You Rejoin	Re-engage lapsed users.

 Email #1 – Immediate Retention Offer

 Sent: Immediately when a user clicks "Cancel Subscription"

 Goal: Offer an incentive to prevent cancellation.

Subject: Wait! Before You Cancel, Here's an Exclusive Offer

Body:

Hi [First Name],

I noticed you're about to cancel your Value Viewpoint subscription. Before you go, I wanted to offer you one of these options to make things easier:

 50% Off for 3 Months – Stay on Pro at half the price.

 Pause Your Account – Take a break & resume later.

 Free 1:1 Strategy Call – Let's troubleshoot any challenges you're facing.

Which option works best for you? Reply and let me know, or click below to continue with the discount.

 [Claim 50% Off] |  [Pause My Account] |  [Schedule a Call]

Best,

Val

 Email #2 – Customer Feedback Request

 Sent: 1 day after cancellation request

 Goal: Collect feedback & offer alternative solutions.

Subject: Quick Question: What Went Wrong?

Body:

Hi [First Name],

I just saw that you canceled your Value Viewpoint subscription, and I'd love to understand why.

 Was it too expensive?

 Did you not see the value?

 Did you experience any issues?

Your feedback helps us improve! Just hit reply and let me know—it takes 10 seconds.

If it was a pricing issue, I'd be happy to offer a special discount or pause your plan for free instead.

Would you like to explore that?

Best,

Val

 Email #3 – Final Offer & Extension

 Sent: 3 days after cancellation request

 Goal: Encourage retention with a free extension.

Subject: Still Thinking? How About 30 More Days Free?

Body:

Hi [First Name],

I totally understand if you need to cancel, but I wanted to offer a free 30-day extension before you go—no commitment, no charges.

 This way, you can keep using Value Viewpoint without losing access to your business cases & reports.

If you'd like the extension, just click below:

 [\[Extend My Trial for 30 More Days\]](#)

If there's anything we could do better, I'd love to hear your thoughts!

Best,

Val

 Email #4 – Win-Back Email

 Sent: 30 days after cancellation

 Goal: Re-engage lost users with an exclusive offer.

Subject: We Miss You! Here's 50% Off If You Rejoin

Body:

Hi [First Name],

We noticed you left Value Viewpoint a while ago, and we'd love to have you back!

 To make it easier, here's 50% off for the next 3 months if you reactivate today.

 [Reactivate & Get 50% Off]

Plus, we've released some exciting updates since you left:

 [New Feature 1] – [Short description]

 [New Feature 2] – [Short description]

 [New Feature 3] – [Short description]

Let me know if you'd like a quick call to discuss how we can help.

Best,

Val

Next Steps

Would you like me to create a referral program email sequence to encourage paying users to bring in new customers? 😊

Referral Program

Here's a referral program email sequence to encourage paying users of Value Viewpoint to refer new customers. This sequence follows proven SaaS referral marketing strategies, offering an incentive-based referral system to drive organic growth.

Referral Program Email Sequence

Email #	Trigger	Subject Line	Goal
1. Referral Program Announcement	Sent to all active users	Earn Rewards! Invite a Friend & Get [Incentive] 🎉	Introduce the referral program & explain benefits.
2. Reminder Email	3 days after first email (if no referral)	Don't Forget – Share Value Viewpoint & Earn!	Reinforce incentive & drive participation.

3. Success Story Email	7 days after first email	See How Others Are Earning with Value Viewpoint!	Share testimonials from users who benefited from referring.
4. Urgency Email	Last 3 days of a limited-time referral boost	Final Call! Get [Extra Bonus] for Referring Today 🚀	Create urgency to increase last-minute referrals.

✉ Email #1 – Referral Program Announcement

📅 Sent: Immediately to all active users

📌 Goal: Introduce referral program & encourage participation.

Subject: Earn Rewards! Invite a Friend & Get [Incentive] 🎉

Body:

Hi [First Name],

We're excited to introduce the Value Viewpoint Referral Program! 🎉 Now, when you refer a friend or colleague, you BOTH get rewarded.

✅ Here's how it works:

- 1) Invite a friend to try Value Viewpoint.
- 2) When they sign up, they get [X] free days & you get [Incentive] (e.g., \$XX credit, free month, etc.)
- 3) More referrals = more rewards!

Your unique referral link:

📌 [Your Referral Link]

💡 The more you share, the more you earn! Start referring today & unlock exclusive perks.

✅ [Refer Now]

Best,

Val & The Value Viewpoint Team

✉ Email #2 – Reminder Email

📅 Sent: 3 days after first email (if no referral made)

📌 Goal: Reinforce the referral incentive.

Subject: Don't Forget – Share Value Viewpoint & Earn!

Body:

Hi [First Name],

Just a quick reminder—you can earn [incentive] for every friend you refer to Value Viewpoint! 🚀

 Your Referral Link: [Your Referral Link]

- ◆ Your friend gets [X] free days
- ◆ You get [Incentive]
- ◆ No limits—the more you refer, the more you earn!

 [Start Referring Now]

Best,
Val

 Email #3 – Success Story Email

 Sent: 7 days after first email

 Goal: Use social proof to drive participation.

Subject: See How Others Are Earning with Value Viewpoint!

Body:

Hi [First Name],

Did you know that some of our users have earned up to [XX] in rewards just by sharing Value Viewpoint with their network?

Here's what [User Name] had to say:

 *"I invited my sales team, and we all started using Value Viewpoint! Not only did I get a free month, but our deals are closing faster!"*

 Your Referral Link: [Your Referral Link]

 Don't miss out—start sharing & start earning today!

 [Refer Now]

Best,
Val

 Email #4 – Urgency Email (Final Call)

 Sent: 3 days before a limited-time referral boost ends

 Goal: Create urgency & boost last-minute referrals.

Subject: Final Call! Get [Extra Bonus] for Referring Today 

Body:

Hi [First Name],

 Last chance! For the next 3 days only, we're offering an EXTRA [Bonus Incentive] for every referral.

- ◆ You get [X] extra days free or [\$XX credit]
- ◆ Your friend gets [X] bonus too!

 Your Referral Link: [Your Referral Link]

 Don't wait—this special bonus expires soon!

[Start Referring Now]

See you inside,
Val

Next Steps

Would you like me to create a loyalty rewards email sequence for long-term paying customers to increase retention? 😊

Loyalty Programme

Here's a loyalty rewards email sequence to increase customer retention and lifetime value for Value Viewpoint. This sequence follows best SaaS loyalty marketing practices, rewarding long-term users with exclusive perks, early access to features, and referral multipliers to encourage continued engagement and upsells.

Loyalty Rewards Email Sequence

Email #	Trigger	Subject Line	Goal
1. Loyalty Program Announcement	Sent to all long-term paying users (3+ months)	Introducing Value Viewpoint Rewards! 🎉	Announce the loyalty program & highlight rewards.
2. Milestone Reward Email	Sent at 6 months	You're a VIP! Here's a Special Gift 📁	Reward users for continued loyalty.
3. Exclusive Feature Access Email	Sent at 9 months	Early Access: Try Our Newest Feature Before Anyone Else 🚀	Offer exclusive beta access as a perk.
4. Anniversary Reward Email	Sent at 12 months	Happy 1-Year Anniversary! A Special Thank You 🎉	Reinforce appreciation & drive upsells/referrals.

5. Upsell & VIP Community Invite	Sent at 15 months	Join Our VIP Circle & Unlock Exclusive Benefits	Encourage users to upgrade to a higher plan or referral bonus.
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 Email #1 – Loyalty Program Announcement

 Sent: After 3 months as a paid user

 Goal: Introduce the loyalty rewards program & highlight benefits.

Subject: 🎉 Introducing Value Viewpoint Rewards – Earn Perks for Your Loyalty!

Body:

Hi [First Name],

We're excited to introduce Value Viewpoint Rewards! 🎉

As a valued user, you now have access to exclusive perks designed to help you get even more value from Value Viewpoint.

✅ What's in it for you?

 Free Bonus Credits – Earn extra business case reports just for using the platform.

 Early Feature Access – Be the first to test new tools & AI enhancements.

 Referral Multipliers – Earn double rewards when you invite others.

 Priority Support – Get faster response times & VIP support.

 You're already enrolled—just keep using Value Viewpoint to start unlocking rewards!

 [\[View My Rewards Dashboard\]](#)

Thanks for being part of the Value Viewpoint community!

Best,

Val & The Value Viewpoint Team

 Email #2 – Milestone Reward Email

 Sent: After 6 months of active paid subscription

 Goal: Reward users & reinforce value.

Subject: You're a VIP! Here's a Special Gift 🎁

Body:

Hi [First Name],

 Congratulations! You've been with Value Viewpoint for 6 months, and we want to say THANK YOU!

As a reward, we've added [Bonus Incentive – e.g., 1 extra month free, bonus reports, or \$XX credit] to your account.

 Your Reward: [Claim My Gift]

We love having you on this journey to accelerate deal closing and prove ROI effortlessly.

Looking forward to celebrating more milestones with you!

Best,
Val

 Email #3 – Exclusive Feature Access Email

 Sent: After 9 months of active paid subscription

 Goal: Reward loyalty with early access to beta features.

Subject:  Early Access: Try Our Newest Feature Before Anyone Else!

Body:

Hi [First Name],

Because you're one of our top customers, we're giving you exclusive early access to our newest feature: [Feature Name]!

 What's new?

 [Feature 1] – [Brief explanation]

 [Feature 2] – [Brief explanation]

 [Feature 3] – [Brief explanation]

You get access before the public launch!

♦ Try It Now → [Activate My Early Access]

We'd also love your feedback on this feature! Hit reply and tell us what you think.

Best,
Val

 Email #4 – Anniversary Reward Email

 Sent: After 12 months of active paid subscription

 Goal: Celebrate one-year loyalty and reinforce long-term retention.

Subject:  Happy 1-Year Anniversary! A Special Thank You from Value Viewpoint

Body:

Hi [First Name],

 Happy 1-Year Anniversary with Value Viewpoint! 

It's been an incredible year, and we're so grateful to have you as part of our community. To celebrate, we're giving you a special anniversary gift:

 [Gift – Free month, additional reports, or a VIP strategy call]

 Claim Your Gift Now → [Redeem Reward]

 As a VIP user, you also get:

- Personalized value review sessions
- Priority access to new features
- Double referral rewards for the next 30 days!

Thanks for being a loyal user—we can't wait to see what's next for you!

Best,
Val

 Email #5 – Upsell & VIP Community Invite

 Sent: After 15 months of active paid subscription

 Goal: Encourage upgrades & exclusive VIP status.

Subject:  Join Our VIP Circle & Unlock Exclusive Benefits

Body:

Hi [First Name],

You've been a valued part of Value Viewpoint for over a year, and we want to invite you to an exclusive VIP program.

 What's included in VIP?

 Access to our Premium Plan for free (for 1 month)

 Exclusive strategy workshops with top sales leaders

 Higher referral rewards & additional discounts

 Limited spots available!

[Join VIP Program]

Thank you for being a valued part of Value Viewpoint!

Best,
Val

 Next Steps

Would you like me to create an NPS (Net Promoter Score) email sequence to collect user satisfaction data and encourage testimonials? 😊

NPS

Here's a Net Promoter Score (NPS) email sequence to gather user feedback, encourage testimonials, and identify potential brand advocates for Value Viewpoint. This sequence follows best practices to maximize response rates and convert satisfied users into promoters.

NPS (Net Promoter Score) Email Sequence

Email #	Trigger	Subject Line	Goal
1. NPS Survey Email	Sent after 30+ days as a paid user	How Likely Are You to Recommend Value Viewpoint?	Gather NPS feedback.
2. Follow-Up for Promoters (Score 9-10)	Sent after user submits a high score	Thanks! Want to Share Your Success Story?	Convert happy users into testimonials & referrals.
3. Follow-Up for Passive Users (Score 7-8)	Sent after user submits a mid-score	We'd Love Your Input – How Can We Improve?	Gather constructive feedback & encourage deeper engagement.
4. Follow-Up for Detractors (Score 0-6)	Sent after user submits a low score	We Hear You – Let's Make Value Viewpoint Better	Address concerns & prevent churn.
5. Reminder Email (If No Response)	Sent 3 days after initial NPS email	Quick Check-In – Your Feedback Matters!	Boost response rates.

Email #1 – NPS Survey Email

 Sent: After 30+ days as a paid user

 Goal: Gather Net Promoter Score (NPS) feedback.

Subject: How Likely Are You to Recommend Value Viewpoint?

Body:

Hi [First Name],

We'd love your quick feedback on your experience with Value Viewpoint so far!

On a scale of 0-10, how likely are you to recommend Value Viewpoint to a friend or colleague?

-  10-9 – I love it!
-  8-7 – It's good, but there's room for improvement.
-  6-0 – I'm not satisfied.

[Give Your Feedback] (Takes less than 30 seconds!)

Your input helps us improve Value Viewpoint and serve you better.

Thank you! 

Val & The Value Viewpoint Team

 Email #2 – Follow-Up for Promoters (Score 9-10)

 17 Sent: After user submits a high NPS score (9-10)

 Goal: Convert happy users into testimonials & referrals.

Subject: Thanks! Want to Share Your Success Story?

Body:

Hi [First Name],

We're thrilled to hear that you love Value Viewpoint! 

Would you be open to sharing your success story with our community? Here's how:

-  Give a quick testimonial – Help others discover the value of Value Viewpoint.
-  Refer a friend & earn rewards – Get [X incentive] for every referral.
-  Feature in our case study – We'd love to showcase your success.

If you're interested, just reply to this email or submit a quick testimonial here → [Share Your Story]

Thanks for being part of Value Viewpoint! 

Best,

Val

 Email #3 – Follow-Up for Passive Users (Score 7-8)

 17 Sent: After user submits a mid-score (7-8)

 Goal: Gather constructive feedback & encourage deeper engagement.

Subject: We'd Love Your Input – How Can We Improve?

Body:

Hi [First Name],

Thanks for your feedback! Since you rated Value Viewpoint a [score], we'd love to hear how we can improve your experience.

 What's one feature or improvement that would make Value Viewpoint even better for you?

👉 [Share Your Feedback]

We're always working to enhance our platform and your input helps us prioritize the right improvements.

Thanks again! 🚀

Best,
Val

✉️ Email #4 – Follow-Up for Detractors (Score 0-6)

📅 17 Sent: After user submits a low NPS score (0-6)

📌 Goal: Address concerns & prevent churn.

Subject: We Hear You – Let's Make Value Viewpoint Better

Body:

Hi [First Name],

I noticed you gave Value Viewpoint a [score], and I really appreciate your honesty.

I'd love to understand what's not working for you.

? Was there a challenge using the platform?

? Is there something missing that you expected?

? Would you like to chat with me directly?

👉 [Give Us Your Feedback]

Your experience matters, and we're here to make it better! If you'd like, I'm happy to schedule a quick call to discuss your concerns.

Just reply to this email, and we'll make things right!

Best,
Val

✉️ Email #5 – Reminder Email (If No Response)

📅 17 Sent: 3 days after initial NPS email if no response

📌 Goal: Boost response rates & gather more NPS data.

Subject: Quick Check-In – Your Feedback Matters!

Body:

Hi [First Name],

Just a quick reminder—we'd love to hear your thoughts on Value Viewpoint!

On a scale of 0-10, how likely are you to recommend us?

[Give Your Feedback] (Takes less than 30 seconds!)

Your feedback helps us improve and continue building the best business case automation platform for sales teams.

Thank you for being part of Value Viewpoint! 🚀

Best,
Val

🚀 Next Steps

Would you like me to create a re-engagement email sequence for inactive users who haven't logged in for a while? 😊

Re-Engagement

Here's a re-engagement email sequence designed to bring back inactive users who haven't logged into Value Viewpoint in a while. This sequence follows best SaaS reactivation strategies, offering value-based reminders, new feature highlights, and time-sensitive incentives to increase re-engagement.

🚀 Re-Engagement Email Sequence

Email #	Trigger	Subject Line	Goal
1. Soft Reminder Email	Sent after 14 days of inactivity	We Miss You! Here's What You've Been Missing 🚀	Nudge users back with a value-based reminder.
2. New Feature Email	Sent after 21 days of inactivity	New Features Just Launched! Come Check Them Out 🎉	Highlight new platform improvements.
3. Personalized Check-In Email	Sent after 30 days of inactivity	Need Help? Let's Get You Back on Track!	Offer assistance & a direct call-to-action.
4. Last Chance Re-Engagement Offer	Sent after 45 days of inactivity	Exclusive Offer: Get [Bonus Incentive] If You Log In Today!	Create urgency with a time-sensitive incentive.

5. Final Win-Back Email	Sent after 60+ days of inactivity	This Is Goodbye... Unless?	Give them one last chance before marking them inactive.
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 Email #1 – Soft Reminder Email

 Sent: After 14 days of inactivity

 Goal: Nudge users back with a value-based reminder.

Subject: We Miss You! Here's What You've Been Missing 

Body:

Hi [First Name],

We noticed you haven't logged into Value Viewpoint in a while—your business cases are waiting!

 Did you know?

 Users who regularly create business cases close 96% more deals!

 You can generate a fully automated ROI report in just 3 clicks.

 We've made improvements to enhance your experience!

Jump back in and see what's new → [Log Back In]

Need any help? Just reply to this email—we're happy to assist!

Best,

Val

 Email #2 – New Feature Email

 Sent: After 21 days of inactivity

 Goal: Highlight new platform improvements to re-engage users.

Subject:  New Features Just Launched! Come Check Them Out 

Body:

Hi [First Name],

We've been busy making Value Viewpoint even better, and we don't want you to miss out!

 Here's what's new since your last visit:

 [Feature 1] – [Short description]

 [Feature 2] – [Short description]

 [Feature 3] – [Short description]

Come check out these updates & see how they can help you close more deals faster!

◆ [Log In & Explore]

See you inside! 🚀

Best,
Val

✉️ Email #3 – Personalized Check-In Email

📅
17 Sent: After 30 days of inactivity

📌 Goal: Offer assistance & direct CTA to log back in.

Subject: Need Help? Let's Get You Back on Track!

Body:

Hi [First Name],

I noticed you haven't been active on Value Viewpoint lately, and I wanted to check in.

? Is there something we can help with?

? Do you need a quick refresher on how to use business cases effectively?

If you'd like, I'm happy to offer a 15-minute strategy session to help you maximize Value Viewpoint.

📌 [Schedule a Call] OR [Log Back In]

Looking forward to hearing from you!

Best,
Val

✉️ Email #4 – Last Chance Re-Engagement Offer

📅
17 Sent: After 45 days of inactivity

📌 Goal: Create urgency with a time-sensitive incentive.

Subject: Exclusive Offer: Get [Bonus Incentive] If You Log In Today!

Body:

Hi [First Name],

We don't want to lose you! As a special thank you, we're offering you [Bonus Incentive – e.g., extra 14-day trial, \$XX credit, exclusive content] if you log in today.

🚀 Your Bonus Includes:

✅ [Free additional business case credits]

✅ [Access to premium features for free]

✅ [Discount on your next month's subscription]

🕒 This offer expires in 48 hours.

👉 [Claim Your Bonus & Log Back In]

Hope to see you back soon!

Best,
Val

 Email #5 – Final Win-Back Email

 Sent: After 60+ days of inactivity

 Goal: Give them one last chance before marking them inactive.

Subject: This Is Goodbye... Unless?

Body:

Hi [First Name],

It looks like this might be our last email to you... unless you'd like to stay with us!

 Here's what you'll miss if you leave Value Viewpoint:

 Automated business case creation in minutes

 96% faster deal closing with ROI-backed selling

 Exclusive sales enablement content & insights

If you're still interested, we'd love to have you back!

[Log Back In] OR [Let Us Know Why You're Leaving]

If you ever need us, we're just an email away!

Best,
Val

 Next Steps

Would you like me to create a customer success onboarding sequence to help new users fully activate and get the most out of Value Viewpoint? 😊

Customer Success Onboarding

 Customer Success Onboarding Email Sequence

Email #	Trigger	Subject Line	Goal
1. Welcome Email	Immediately after signup	Welcome to Value Viewpoint! Let's Get You Started 	Introduce platform & encourage first login.

2. Quick Win Email	Sent 1 day after signup	Your First Business Case is 3 Clicks Away!	Get users to create their first business case.
3. Feature Introduction Email	Sent 3 days after signup	Boost Your Sales with These Power Features 🔥	Highlight key features to encourage deeper engagement.
4. Social Proof & Use Case Email	Sent 5 days after signup	See How [Company X] Closed Deals 2X Faster	Show success stories to reinforce value.
5. Trial Expiry Reminder #1	Sent 5 days before trial ends	Your Free Trial Ends Soon – Don't Lose Your Progress!	Create urgency & encourage paid conversion.
6. Trial Expiry Reminder #2 (Final Push)	Sent 1 day before trial ends	Last Chance: Keep Access to Your Business Cases!	Final push before trial expiration.
7. Post-Trial Follow-Up	Sent 3 days after trial ends (if no conversion)	Still Deciding? Get 7 More Days Free!	Offer a trial extension or discount.

✉️ Email #1 – Welcome Email

📅 Sent: Immediately after signup

📌 Goal: Encourage users to log in & take the first action.

Subject: Welcome to Value Viewpoint! Let's Get You Started 🚀

Body:

Hi [First Name],

Welcome to Value Viewpoint! You're now one step closer to closing more deals faster with automated business cases.

✅ Here's how to get started in 3 simple steps:

- 1 Create your first business case – [Click Here]
- 2 Choose your industry & technology
- 3 Get a tailored ROI model in minutes!

💡 Need help? Book a free onboarding call → [Schedule Demo]

Your free trial is active for [X] days, so let's make the most of it!

🚀 [Log In & Get Started]

Best,
Val & The Value Viewpoint Team

✉️ Email #2 – Quick Win Email

📅 17 Sent: 1 day after signup

📌 Goal: Get users to generate their first business case.

Subject: Your First Business Case is 3 Clicks Away!

Body:

Hi [First Name],

Did you know that sales teams using Value Viewpoint close 96% more deals? Now it's time to create your first automated business case.

✅ It takes just 3 clicks!

📊 Select your industry

🔍 Input a few deal details

📈 Generate your custom business case & ROI report

🚀 Try it now → [Create Your First Business Case]

Let me know if you need help!

Best,
Val

✉️ Email #3 – Feature Introduction Email

📅 17 Sent: 3 days after signup

📌 Goal: Introduce key features for deeper engagement.

Subject: Boost Your Sales with These Power Features 🔥

Body:

Hi [First Name],

Now that you've started using Value Viewpoint, let's unlock some powerful features to supercharge your sales process.

🔥 Key Features You Should Try:

✅ Automated ROI Modeling – No more spreadsheets!

✅ Customizable Business Case Reports – Tailored to each prospect.

✅ Team Collaboration – Work together on high-value deals.

 Explore Features Now → [Log In]

Need help? Book a free walkthrough here → [Schedule a Call]

Best,
Val

 Email #4 – Social Proof & Use Case Email

 Sent: 5 days after signup

 Goal: Reinforce platform value with a success story.

Subject: See How [Company X] Closed Deals 2X Faster

Body:

Hi [First Name],

What if you could cut your sales cycle in half just by showing ROI upfront?

 [Company X] did exactly that with Value Viewpoint.

- Challenge: Their deals were stalling due to ROI uncertainty.
- Solution: They used automated business cases to prove the financial impact.
- Result: Deal velocity increased, and their close rate improved by 96%!

 Now it's your turn → [Create Your Next Business Case]

Let me know if you'd like a quick 1:1 session.

Best,
Val

 Email #5 – Trial Expiry Reminder #1

 Sent: 5 days before trial ends

 Goal: Create urgency for users to upgrade.

Subject:  Your Free Trial Ends Soon – Don't Lose Your Progress!

Body:

Hi [First Name],

Your free trial of Value Viewpoint ends in 5 days.

 Without access, you'll lose:

 Your saved business cases & ROI reports

 Instant access to automated value selling

 Your edge in closing deals faster

But you can keep it all—just upgrade now.

 [Upgrade Now & Keep Your Access]

Let me know if you need more time!

Best,
Val

 Email #6 – Trial Expiry Reminder #2 (Final Push)

 Sent: 1 day before trial ends

 Goal: Make a final push to upgrade before trial expiration.

Subject:  Last Chance: Keep Access to Your Business Cases!

Body:

Hi [First Name],

Your Value Viewpoint trial expires in 24 hours!

 Without upgrading, you will lose:

 All saved business cases

 Instant ROI modeling & sales enablement features

 Your edge in closing more deals, faster

But you can keep everything—just upgrade now.

 [\[Upgrade Now\]](#)

Have questions? Reply, and I'll help!

Best,
Val

 Email #7 – Post-Trial Follow-Up

 Sent: 3 days after trial ends (if no conversion)

 Goal: Bring users back with a trial extension or discount.

Subject: Still Deciding? Get 7 More Days Free!

Body:

Hi [First Name],

I noticed your Value Viewpoint trial ended—but I don't want you to miss out!

 Let's extend your trial for 7 more days—completely free.

 That way, you can fully experience automated business case creation and see how it helps you close deals faster.

Click below to reactivate your account:

 [\[Extend My Trial for Free\]](#)

See you inside,
Val

Next Steps

Would you like me to create a customer expansion (upsell & cross-sell) email sequence to increase revenue from existing users? 😊

Customer Expansion

Customer Expansion (Upsell & Cross-Sell) Email Sequence

Email #	Trigger	Subject Line	Goal
1. Upgrade Invitation Email	Sent after 30 days of active use	Ready to Scale? Unlock More Value 🚀	Introduce benefits of upgrading to a higher-tier plan.
2. Cross-Sell Feature Email	Sent after 45 days of active use	Boost Your ROI – Try [Premium Feature] Today!	Encourage adoption of additional features.
3. Team Expansion Email	Sent after 60 days of active use	Bring Your Team Onboard – Work Smarter Together!	Encourage users to invite team members.
4. Personalized Upsell Email	Sent after 75 days of active use	[First Name], You're Missing Out on [Feature]	Use personalized insights to drive an upsell.
5. Exclusive Offer Email	Sent after 90 days of active use	Upgrade Today & Get [Bonus Incentive]! 🎁	Provide a time-sensitive incentive to upgrade.

Email #1 – Upgrade Invitation Email

 Sent: After 30 days of active use

 Goal: Introduce benefits of upgrading to a higher-tier plan.

Subject: Ready to Scale? Unlock More Value 🚀

Body:

Hi [First Name],

You've been using Value Viewpoint for a month now, and we hope you're seeing the impact on your deal conversion rates!

To help you scale even faster, we'd love for you to try [Premium Plan], which includes:

- 🚀 Advanced ROI Modeling – More powerful insights to justify your deals.
- 📊 Customizable Business Case Reports – Tailored to your specific needs.
- 👥 Team Collaboration Features – Work with your entire sales team.

👉 Upgrade now & get [Bonus Incentive] for a limited time!

✅ [Upgrade to Pro]

Have questions? Reply, and I'll be happy to help!

Best,
Val

✉️ Email #2 – Cross-Sell Feature Email

📅 Sent: After 45 days of active use

📌 Goal: Encourage adoption of premium features.

Subject: Boost Your ROI – Try [Premium Feature] Today!

Body:

Hi [First Name],

Did you know that [Premium Feature] helps users increase deal close rates by X%?

🔥 With [Premium Feature], you can:

- ✅ [Benefit 1] – [Short explanation]
- ✅ [Benefit 2] – [Short explanation]
- ✅ [Benefit 3] – [Short explanation]

🚀 See it in action → [Activate [Feature] Now]

Want a quick walkthrough? Schedule a 1:1 session → [Book a Demo]

Best,
Val

✉️ Email #3 – Team Expansion Email

📅 Sent: After 60 days of active use

📌 Goal: Encourage users to invite team members.

Subject: Bring Your Team Onboard – Work Smarter Together!

Body:

Hi [First Name],

Great sales teams win together. Did you know you can collaborate with your team inside Value Viewpoint to scale your deals faster?

 Why add your team?

- Faster deal collaboration – Build business cases together.
- Shared insights – Keep everyone aligned with real-time updates.
- Better decision-making – Get team-wide buy-in on ROI models.

 For a limited time, add your team & get [Bonus Incentive]!

[Invite My Team Now]

Best,

Val

 Email #4 – Personalized Upsell Email

 Sent: After 75 days of active use

 Goal: Use personalized insights to drive an upsell.

Subject: [First Name], You're Missing Out on [Feature]

Body:

Hi [First Name],

We've noticed you're actively using Value Viewpoint (awesome! ) , but you haven't yet unlocked [Premium Feature].

 With [Premium Feature], you can:

 [Personalized Insight – e.g., “Increase win rates by X%”]

 [Exclusive Benefit – e.g., “Gain deeper buyer insights”]

 [Scalability – e.g., “Automate even more of your sales process”]

Let's unlock this for you today!

[Upgrade to Pro Now]

Need a quick chat? Reply & I'll walk you through it!

Best,

Val

 Email #5 – Exclusive Offer Email

 Sent: After 90 days of active use

 Goal: Provide a time-sensitive incentive to upgrade.

Subject: Upgrade Today & Get [Bonus Incentive]! 🎁

Body:

Hi [First Name],

We've got a special, limited-time offer just for you. Upgrade to [Premium Plan] today and get [Bonus Incentive – e.g., 1 free month, exclusive feature access, or \$XX discount].

🔥 Why upgrade now?

- ✅ Unlock premium ROI modeling tools
- ✅ Get unlimited access to business case reports
- ✅ Boost deal win rates by [X%]

But hurry—this offer expires in 48 hours!

✅ [Upgrade Now & Claim My Bonus]

Best,

Val

🚀 Next Steps

Would you like me to create a customer success retention sequence to keep long-term users engaged and prevent churn? 😊

Customer Success Retention Email Sequence

Email #	Trigger	Subject Line	Goal
1. Proactive Value Check-In	Sent after 60 days of active use	Still Winning More Deals? Let's Check In!	Reinforce value & encourage ongoing engagement.
2. Advanced Feature Showcase	Sent after 75 days of active use	Power Up Your Sales Process with These Features!	Encourage deeper usage of premium features.
3. Exclusive User Webinar Invite	Sent after 90 days of active use	Join Our VIP Customer Roundtable! 🚀	Engage users with community & expert insights.

4. Account Health Check & Support Offer	Sent after 120 days of active use	Need Any Help? Let's Optimize Your Workflow	Prevent churn by addressing any frustrations.
5. Anniversary Milestone Celebration	Sent after 6 months of active use	6 Months with Value Viewpoint – Here's a Gift! 🎁	Reward loyalty with a special incentive.

✉️ Email #1 – Proactive Value Check-In

📅 17 Sent: After 60 days of active use

🎯 Goal: Reinforce value & encourage continued engagement.

Subject: Still Winning More Deals? Let's Check In!

Body:

Hi [First Name],

You've been using Value Viewpoint for 2 months now, and we'd love to hear how it's going!

💡 How's your experience so far?

✅ Have you been able to close deals faster?

✅ Are you getting the most out of your business cases?

✅ Need any help optimizing your process?

Let us know! Just reply to this email or schedule a quick strategy call to ensure you're getting the most value.

🚀 [Book a Free Check-In]

Best,

Val

✉️ Email #2 – Advanced Feature Showcase

📅 17 Sent: After 75 days of active use

🎯 Goal: Encourage deeper usage of premium features.

Subject: Power Up Your Sales Process with These Features!

Body:

Hi [First Name],

You're already using Value Viewpoint, but did you know you could get even more value by using these features?

🔥 Advanced Features You May Have Missed:

📊 Custom ROI Reports – Tailor business cases to your buyer's needs.

-  Team Collaboration – Work together to refine sales strategies.
-  AI-Powered Business Case Enhancements – Get instant recommendations.

Unlock these features & boost your deal conversions!

 [Explore Advanced Features]

Need help? Book a quick walkthrough → [Schedule Here]

Best,
Val

 Email #3 – Exclusive User Webinar Invite

 Sent: After 90 days of active use

 Goal: Engage users with community & expert insights.

Subject: Join Our VIP Customer Roundtable! 

Body:

Hi [First Name],

We're inviting our top users to a private, invite-only webinar where we'll share:

-  Advanced ROI strategies for sales teams
-  Case studies from top-performing Value Viewpoint users
-  Live Q&A with our product team

 Secure your spot → [Register Now]

Can't wait to see you there!

Best,
Val

 Email #4 – Account Health Check & Support Offer

 Sent: After 120 days of active use

 Goal: Prevent churn by addressing any frustrations.

Subject: Need Any Help? Let's Optimize Your Workflow

Body:

Hi [First Name],

We want to make sure you're getting the most value possible from Value Viewpoint.

- ◆ Is there anything we can improve?
- ◆ Do you have any challenges using the platform?
- ◆ Would you like a quick refresher on best practices?

We're here to help! Reply to this email or book a free strategy session.

 [Book a Call with Our Success Team]

Best,
Val

 Email #5 – Anniversary Milestone Celebration

 Sent: After 6 months of active use

 Goal: Reward loyalty with a special incentive.

Subject:  6 Months with Value Viewpoint – Here's a Gift!

Body:

Hi [First Name],

 Congratulations! You've been with Value Viewpoint for 6 months, and we're celebrating you!

To show our appreciation, we're giving you [Bonus Incentive – e.g., a free month, exclusive access, or a referral bonus].

 [Claim Your Special Reward]

Thank you for being a valued part of our community. Here's to even greater success in the next 6 months!

Best,
Val

 Next Steps

Would you like me to create a renewal reminder email sequence to encourage annual subscribers to renew their plans? 😊

 Renewal Reminder Email Sequence

Email #	Trigger	Subject Line	Goal
1. Early Renewal Reminder	Sent 30 days before renewal	[First Name], Your Value Viewpoint Subscription Renews Soon! 	Inform users of their upcoming renewal & reinforce value.
2. Mid-Cycle Reminder with Renewal Incentive	Sent 14 days before renewal	Renew Now & Get [Bonus Incentive]!	Encourage early renewal with an exclusive offer.

3. Final Reminder Before Auto-Renewal	Sent 3 days before renewal	Last Chance: Don't Lose Access to Your Business Cases!	Create urgency & prevent last-minute cancellations.
4. Expiration Notice & Grace Period Offer	Sent 1 day after expiration (if not renewed)	Your Subscription Has Expired – Reactivate Now!	Encourage users to renew with an extended grace period.
5. Win-Back Email for Lapsed Subscribers	Sent 7 days after expiration	We'd Love to Have You Back – Get 10% Off Your Renewal!	Re-engage lost subscribers with a discount.

 Email #1 – Early Renewal Reminder

 Sent: 30 days before renewal date

 Goal: Inform users of their upcoming renewal & reinforce value.

Subject: [First Name], Your Value Viewpoint Subscription Renews Soon! 🎉

Body:

Hi [First Name],

It's been an incredible year with you on Value Viewpoint! Your subscription will automatically renew on [Renewal Date], ensuring uninterrupted access to:

- ✅ Automated Business Case Creation – Keep winning deals faster.
- ✅ ROI Modeling & Custom Reports – Deliver financial insights to buyers effortlessly.
- ✅ All Premium Features – Continue using our most powerful tools for sales success.

💡 No action needed—your plan will renew automatically! If you have any questions, feel free to reach out.

Want to lock in a special renewal offer? Upgrade to an annual plan & save [X]% → [Renew Now]

Thanks for being part of Value Viewpoint! 🚀

Best,

Val

 Email #2 – Mid-Cycle Reminder with Renewal Incentive

 Sent: 14 days before renewal date

 Goal: Encourage early renewal with an exclusive offer.

Subject: Renew Now & Get [Bonus Incentive]!

Body:
Hi [First Name],

Your Value Viewpoint subscription renews in 14 days, and we have a special offer for you!

-  Renew today & get:
-  [Bonus Incentive – e.g., extra month free, discount, VIP support]
-  Locked-in pricing before any future price increases
-  Full access to premium features for another year

Don't miss out—this exclusive bonus is only available for early renewals!

 [Renew Now & Claim Your Bonus]

Best,
Val

 Email #3 – Final Reminder Before Auto-Renewal

-  Sent: 3 days before renewal date
-  Goal: Create urgency & prevent last-minute cancellations.

Subject: Last Chance: Don't Lose Access to Your Business Cases!

Body:
Hi [First Name],

Your Value Viewpoint subscription renews in 3 days, and we don't want you to lose access to:

-  Your saved business cases & ROI reports
-  Automated tools that help you close deals faster
-  Exclusive insights & premium features

No action is needed—your subscription will renew automatically. However, if you have any questions or need help, feel free to reach out.

Still deciding? Lock in your renewal now → [Renew My Subscription]

Best,
Val

 Email #4 – Expiration Notice & Grace Period Offer

-  Sent: 1 day after expiration (if not renewed)
-  Goal: Give users a grace period to reactivate.

Subject: Your Subscription Has Expired – Reactivate Now!

Body:
Hi [First Name],

Your Value Viewpoint subscription has expired, and we don't want you to lose access to:

- ✗ Your saved business cases & reports
- ✗ Automated ROI modeling & premium features
- ✗ Your competitive edge in sales

Good news! We're giving you a 7-day grace period to renew with all your data intact.

✓ [Reactivate Now] – Don't lose your progress!

Need assistance? We're happy to help! Just reply to this email.

Best,
Val

✉ Email #5 – Win-Back Email for Lapsed Subscribers

 Sent: 7 days after expiration

 Goal: Re-engage lost subscribers with a discount or incentive.

Subject: We'd Love to Have You Back – Get 10% Off Your Renewal!

Body:

Hi [First Name],

We noticed you didn't renew your Value Viewpoint subscription, and we'd love to welcome you back!

 Come back today & get 10% off your renewal!

 Instant access to all premium features

 Keep your saved business cases & reports

 Close deals faster with automated ROI insights

 This offer is only available for the next 48 hours!

✓ [Reactivate Now & Get 10% Off]

Need help? Just reply to this email!

Best,
Val

 Next Steps

Would you like me to create a VIP membership email sequence for top-tier customers who renew annually? 😊

