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ISBN: 9798699955305

Cover and Interior design: Ostrich Publishers

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Printed in The United States of America

OSTRICH
Charlotte, NC.

To the men and women out there on the frontlines of this current health crisis - paving the way for non-essentials like myself to earn a living, I say:

THANK YOU!

CONNECTING

THROUGH DATA

Streamlining your direct-marketing campaigns through the use of targeted sales data.

GATHONI NJENGA

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CONNECTING
THROUGH DATA

The people we know

People buy from people they like and trust. This concept is as true today as it was yesterday and the day before. To be successful in business, to be able to build a profitable sales-oriented enterprise, whether, in insurance, real estate, or any other relationship-centric business, we must first build a system that helps us introduce our offering to as many (qualified) new folks as possible.

This act of "prospecting" must be undertaken on a consistent basis. Whether you run a solo (business-to-business) operation or a large (consumer products and services) organization with hundreds, even thousands of sales professionals, seeking out members of a well-defined audience and connecting with said audience in ways that not only adds to the bottom line but also increases brand penetration must be of the utmost importance, company-wide.

As we work to help folks understand what it is that we do and how we can help add value to their lives and that of those they care most about, we must ensure that we are consistently forming bonds with those who are most likely to consume what we offer. We must also engage in various activities that will help build those two basic elements that we know lead to profitable client relationships: Like and trust.

In this book, one of the many I have written on the topic of sales, and marketing, I shall delve into the topic of building your direct sales business through the strategic use of either consumer or business sales data. Sales data also known as sales leads. In this book, I shall talk about:

1. Ways in which you can think about your audience and how quality sales data can help streamline your view of who your ideal customer is and the reality that exists in the marketplace.

2. The major differences between audience segmenting based on demographics as compared to looking at your audience based on behavior.

3. The most effective ways - based on your type of business, audience demographics, and resources - to connect with your prospective customers and the historical success rate of each channel.

4. How best to craft your brand and/or product message to allow for maximum impact.

5. About ways in which you can improve your marketing campaigns by looking at the world through the eyes of your would-be customer.

6. Many more.

Enjoy!
Gathoni

One

Nobody actually likes meeting new people

If you have ever been on a blind date before, or perhaps went on a first date with someone you barely knew, then I am sure you are all too familiar with the overall awkwardness of such an encounter. I have no doubt that as a human being with the need to form bonds, and build relationships, this difficulty, you accept as part of the relationship-building process, for this is the only way through which you will be able to (at least) try to build your own tribe.

We all do. We all accept that we must travel this often (seemingly) pointless road that is "dating" if we want to find companionship. Sure! Going on dates, meeting new people seems easy - even enjoyable- when we are young. We often love to get out there and mingle when we are in our

teenage years, all the way up to probably our early thirties.

Although, as we hit this age, we try to limit our circle to just a few friends with who we are familiar and much more comfortable than we are when we are out there seeing new faces. I have often said that, despite what some of my fellow sales professionals tell you, no “normal” person actually likes meeting new people. Not as an adult anyway.

We like to get to know new people of course. The “meeting” part I am not too sure about. Most adults, outside of dating, often have to meet and get to know new people as a necessity, right? You probably have to meet and get to know your child’s teacher.

You also might want to try to get to know your doctor, right? At least your primary physician. We must all communicate and associate with folks that maybe in any other circumstance, we wouldn't be too crazy about. My goal, even before we get into the many ways you

can use data to power your sales and marketing, is to try to help you get into the mindset of the quintessential sales professional.

If you are a sales veteran, then feel free to skip this part. There are few tools I would like to share with you to help you prepare yourself to survive and thrive in the dynamic world of direct sales.

Its about them, not you

I don't mean to be harsh, but this is a point I feel I must start off with as I see this issue all the time. Although I must admit, this is often an issue with folks who are just getting started in their new business or role as a sales professional. Based on my observations, there are many complex reasons why newer business owners and such, typically fall victim to this type of profit-zapping behavior.

The thing about sales is that you are often going to be dealing directly with human beings. Whether you offer your products and services to everyday consumers or other *businesses, if you* are selling, you are talking to people all day. And

let me just say that “people are strange”. We all are! We are at our strangest when we are in the process of buying things, anything. Especially, the things we feel offer no immediate benefit. As you can imagine, this issue is even more pervasive with younger audiences and these days with social media and all. We are all strange little creatures when we engage in the sales process.

For this reason, I would advise that once you have put someone through your prospecting process and said person has acknowledged their desire to hear more about your offering, you do not take anything personal. It is important that you maintain an almost robotics engagement in your process and be sure to make the entire sales/prospecting process about your potential customer/client.

It is important to understand and allow them (your prospect) to go through their own unique decision-making twists and turns. You *must allow them to be awkward, and even* evasive at times. You must understand that this is about them, and not you. Do not read too much

into the ups and downs of any sales engagement as doing so is 1) not mentally healthy for you, and 2) will cause you to miss out on many sales opportunities.

Complicated feelings

Phone avoidance or sales avoidance is the killer of any sales organization. One way or another, we have all been there before. Don't get me wrong. No matter your type of business or product line, or even type of customers you work with, we have all had days where “we just don't want to do it”.

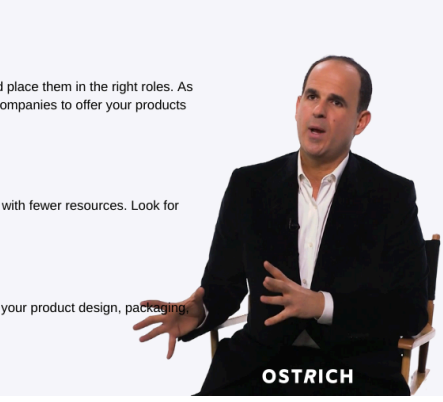
For me, this is typically when I take a short vacation. We (sales folk) call these days, and the games we play to get around getting on the phone with our clients, or meeting our prospective customers face-to-face, call avoidance, or phone avoidance, or sales avoidance.

There is nothing wrong with feeling this way occasionally. This doesn't make you a suckie salesperson. This just makes you human. You don't hear much about this issue because folks don't like to admit that they too feel this way from

time to time. It is best to create a system around dealing with this feeling (we all get sometimes). And doing your absolute best to navigate these days in a way that leaves you refreshed and ready to do your best work once you come out at the other end.

The thing though is that you cannot afford to let the amount of these types of days creep up beyond the actual total productive days. You cannot be on vacation for more days than you actually work. For obvious reasons, of course. Also, what might be happening could be a bit more serious than you might think.

It is normal for all of us - you, me, him, her - to feel a bit awkward when selling to folks we don't know. It is also, as I have stated before, normal to have days when we just don't feel like talking to folks about our products, services, and/or our company. Not feeling like *doing it* most of the time might be a reason to sit back and assess and reevaluate your career or business choices. And at the very least, look at more aggressive ways to help combat perhaps the



anxiousness around the sales process in its entirety.

People problems

Let me go ahead and try to reiterate this point as I am sure this will be one of the most cumbersome issues to navigate during your career as a sales and marketing professional. The way I see it, whether dealing with other homo sapiens as business partners, customers, friends, etc. Folks are complex.

I am not sure if you are familiar with Marcus Lemonis' concept of the three P's. The idea goes something like this: For a business to be successful, or investable in the star of CNBC's The Profit's case, said business must have a good process in place. It must have a great product and great people.

In sales, the first to worry about is the "People" part. The people you bring on as sales associates, the people you sell to, and so on. There are many

ways to help streamline this conspicuously complicated factor in sales. But for now, let me just highlight a few things associated with dealing with folks that you as a salesperson must understand and internalize and also work into your sales process.

People are creatures of habit

This is a fact. We all are. More often than not, when faced with a choice between doing something beneficial, something important - and something we are used to and comfortable with - We, 9 times outta ten, go for the action or set of actions we are used to. We often engage in a set of tasks that we are simply used to doing. This is just how we all are, to some degree.

Asking folks to do something out of the ordinary, like meeting with a sales professional, financial adviser, etc. Will, no doubt be outside of the realm of "normal" for the decision-makers you try to pitch your products and/or services to. For this major reason, I urge that you exercise patients and understanding.

I have met a bunch of folks - new business owners, and sales folk - who take any deviation from a previously agreed upon meeting arrangement as a sign that the prospect is no longer interested. Or that the person is “not serious”, or “playing games”. This typically isn't so.

I tell folks all the time that there could be a million reasons why folks will reschedule a meeting at the last minute or not show up for one or fail to show up on a Zoom Call- meeting. It is best to simply create a system that allows you - without emotion - to reach back out to these types of prospects to allow many other chances to connect.

People have lives

If as part of your sales process you typically meet with your prospective customers or ask that they give you some of your time over the phone, or through some other communication channel - which is often the case in direct sales, then you must understand that folks will not make meeting

with you a priority. I know you imagined that like you, all these folks did all day was look forward to their meeting with you. You want to hear the truth? They didn't. They probably forgot till you called to remind them or when they saw your reminder text or email.

This is often the case if you are especially offering a product that does not carry an immediate benefit. In using marketing data or sales leads to drive your outreach, you will typically be connecting with folks who may be suitable for your product, or might have been thinking about it, but were not quite at the point where they were ready to initiate contact with a purveyor of said offering.

For this reason, you must understand that your job will be to try to get them to meet sooner than later. For example, a couple that had considered buying a second home down the line might be willing to meet with you if you can eliminate the reason they were waiting.

This same couple would probably be open to sitting down with you: The mortgage broker, if

you let them know that “interest rates are at an all-time low” and you can help them finance their second property at a fraction of the usual costs.

That being said, there are two major elements to work into your approach. 1) You must be cognizant of the fact that this hypothetical meeting will not be a priority for the couple. Between work, the kids’ school, after-work activities, they might simply not have time to meet.

You must be ready to apply a multi-effort system when looking to connect with your prospective customers. 2) You must try as much as possible to make not just your meetings but all things you do in service to your customers convenient for them. You might be - if you meet with folks face-to-face - willing to meet them at a place that might be out of your way but convenient for them.

Try to think outside the box to help make working with you and your organization - from the perspective of your clients and prospects - easier than your competitors.

Data + You

I decided to start a book about working with sales leads and sales data this way to help establish the fact that your sales data will only be as effective as the systems you build around them, and the consistency, and intensity with which you decide to execute your meticulously planned direct marketing campaigns or donor outreach initiative.

"Do you want to know who you are? Don't ask.

Act! Action will delineate and define you."

-Thomas Jefferson

Two

Profiles in courage

“It's not rocket science”. You hear this quote all the time in the realm of the modern-day lexicon. The idea of course is that whatever it is that is on the agenda is not as difficult as one would assume. Since I have no clue how hard (or not) rocket science actually is, I will just assume some level of intellectual difficulty is built into the

rocket-ing, or perhaps, the science-ing part.

I mean, it sounds hard enough. That being said, we entrepreneurs often fall victim to this idea of making things harder than they seem. A veteran insurance sales agent once told me a really funny story. He said he once worked with a guy who would close sales at an unusually high rate.

The surprise was not that this fella actually was able to acquire new customers. The surprise was in how he actually got folks to sit down and talk to him about coverage. You see, while cold calling, when other agents, his colleagues were carefully reading word-for-word from their assigned sales scripts, this man would just pull up folks who met the demographic identity of households and individuals he had had great experiences with and call them up.

And once folks answered, he simply asked: "do you want life insurance?". Every week, enough people were intrigued enough by this simple question to set up in-person meetings with him.

This story was told to me once and I have subsequently told this story to many folks I have worked with.

The way I see it, there are many ways to build and execute effective sales and marketing campaigns. The key is to be proactive. That being said, I am not familiar with any self-respecting professional who will simply call folks up and ask if they want what they are offering. Not in those terms anyway. Sure, some may have had some success with this approach but for the rest of us, we must employ a multi-faceted approach to reaching out to the folks we seek to help.

Understanding who your customer is

Having some business experience under your belt in any business or having some kind of track record goes a long way to help you use your sales data to streamline your marketing activities. Although, I am sure you dream of "everyone" being a good candidate for your products - I mean, wouldn't that be nice? - the reality is that outside of some widely used offerings, most of

what we sell tend to be niche or at the very least attract a specific type of person.

There are many ways and many lenses through which businesses try to ascertain and dissect who their typical customer is, what makes them tick, and how to go after more like them. To the untrained eye, this part of marketing, or should I say pre-marketing and pre-sales moves may seem like a complete waste of time.

In fact, most of the new business owners and sales folks I come across pay very little attention to this. Our company develops and markets sales-related software to the small business demographic. Our most popular product, Salesfully, provides a robust platform for small operators to access quality sales leads.

I bring this up because most of the "just starting out" folks who use our system seem to jump right into the act of marketing using our data only to realize that there are some missing pieces in their plan. In these types of situations, most folks will typically blame the lack of traction on their leads or software application and move

on.

The thing is - bigger firms do not have this issue. Among the many reasons I could give for this, the main takeaway is that larger firms approach the use of marketing data in an entirely different way as compared to the small *business owner*.

Hypothetical profiles

Sure, most large organizations, even non-profits, try to first establish a means through which they can reach out to as many folks as possible at an affordable rate. The idea - where the data comes in - is to reach out to folks with a product or offer they know the receiver will be interested in.

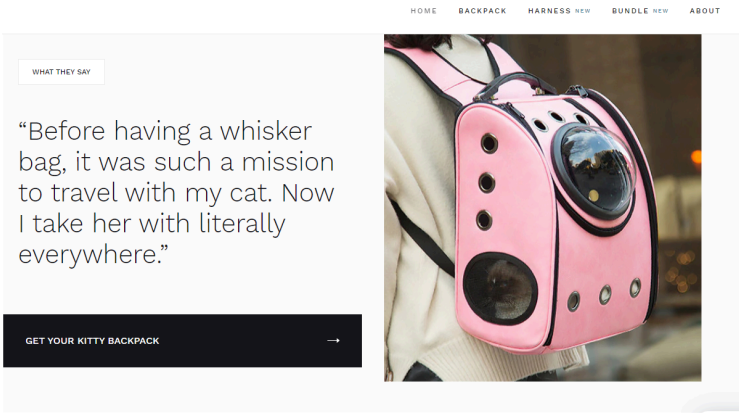
Through direct or indirect analysis and sometimes, a combination of both, most firms will try to get their message out to the folks they know are likely to take some set of actions towards a purchase, subscription, donation, and so on. Through your data, you can get the information you need to know who to reach out to, how to best contact folks, and how to present your offer in the most immersive and enticing way possible.

Before we go any further, let me share with you my mindset as far as direct selling goes. The way to think about reaching out to folks with your messaging, whether cold-calling, door-knocking, emailing, and so on is to understand that you are going to be interrupting an unsuspecting candidate with an offer (you know) they might be interested in.

You will be doing "interruption marketing" and that comes with some awkwardness and you might from time-to-time encounter resistance and a whole lot of "no's" and "I am not interested's". That just comes with sales and marketing, especially direct sales. The idea is to reach out to enough folks, so the numbers start to make sense. Meaning enough of the folks contacted show interest.

Reaching out to folks based on analytical data is very unlike just randomly calling or emailing folks. For example, if your company sells specialty cat travel bags like whiskerbag.com and you decide to introduce this new product to folks. Let's say you are calling folks to tell them about

this new idea and are looking for folks who will allow you to send them some information in the mail, you are more likely to succeed in getting enough bites if you only call folks you know have cats *or like cats*.



www.whiskerbag.com

I will introduce some extremely specific examples of data samples as we move along. For now, what we want to do is to try to - in our minds- find/figure out the types of people who are more likely to look at what we have to offer. If offering Cable TV services and products, you are more likely to have some profitable level of success if you reach out to older (55+) persons of color,

men, who have just moved into a new residence. Better if they have just moved into an apartment in an urban setting.

These are the specific markers that I assure you will enable your direct marketing campaign to have an acceptable ROI. Before you even dig into the various available information within your specific data - which will vary in detail based on where you got the data - you will want to at the very least, create a hypothetical profile of your ideal customer.

Data-based approach

There is no wrong or right way to do this. As I said, you can rely solely on past successes. And if you are just starting out and have no clue how to build an audience profile and where to start to even try to figure out what your audience "looks" like, have no fear. You might have to do some research and a whole lot of trying and error-ing though.

You first want to have a considerably basic profile. Let's use the sale of Individual Whole Life

insurance as an example. You can simply dig into the data available on platforms like Esri (esri.com) and any other platform from which you can create a profile of folks who typically buy these types of insurance products.

What is the age range for such prospects? Where do they typically live? Are they overwhelmingly urban dwellers or suburbanites? What are their major concerns when it comes to securing the future of their loved ones? What are the income levels, educational backgrounds, ethnicities, gender of your typical prospects?

These are some of the basic questions you want to be able to answer in your first draft. Using these datapoints as your foundation will help you build marketing lists that are more likely to generate the sales you need as opposed to simply creating a list of names and numbers.

Demographics and beyond

The types of data we have addressed all fit into the "demographics" section of the table. As you develop a more cohesive robust marketing

infrastructure and as a result, a more profitable business, you will start to see people as more than just their datapoints - or "stats" if you will. You will start to realize that human beings are one thing on paper sure, but depending on various fluid circumstances, can be many things to many people at various times.

Folks who move from city settings to the country can often, with time, start to behave very differently from what their profile might suggest. Some liberal-minded folks start to become conservative- even though they would deny it - once they marry into a right-leaning family. We saw, over the summer of 2020, hundreds of thousands of white, young, suburban folks join in the nation-wide protests against racial injustice and police brutality. These are folks who were brought together - regardless of demographics and background- by a common cause.

You will also start to realize that most of our buying decisions are based on emotional reasons and our commitment to certain lifestyles, ideals, and movements. Once you add these factors into

the mix, you will start to realize that just looking at your prospective customers and how you craft your marketing messaging just based on demographics just isn't enough.

Some marketers - much smarter than I - have realized that we must add in these factors and start to think of customers and potential customers as "tribes". These are the folks that are often bound by ideas and factors that go beyond just their demographic data. As you grow your business and seek to expand your reach, you will learn how to tap into this idea to expand your customer base.

Three

Making connections through structured data

I have no doubt that most people would agree that their favorite types of people to relate to- be it in a romantic or platonic, or even professional relationship - are those with who they are comfortable.

As I alluded to earlier: "Nobody actually likes to meet new people". As a collective, humans are more inclined to spend time and even do business with folks they know and are used to. There are some who even when filling top cabinet positions, would rather work with family members, and close acquaintances.

Of course, this is not always a good thing. We cannot simply engage in commerce with folks just based on our affinity towards them. That

being said, and since I am sure you are a capable professional who knows what you are doing, you are more than up to the task of helping folks navigate the purchase and consumption of your product.

Direct sales, for you or any other business person/ sales professional, will revolve around reaching certain milestones in a process that allows the prospective customers you interact with to gain a deep understanding of what you are offering, see how your offer helps them solve a problem or fulfills some other need and positioning yourself and your brand as the ideal candidate.

This process is one that, unfortunately, cannot be hastened or circumvented except in the rare occasion where perhaps your solution is the only one available in the marketplace, or that what you offer is part of a set of solutions that are mandated by law. This is the reason why although we all must consume and pay for products developed and distributed by the Department of motor vehicle, we never see ads from the DMV.

The Internal Revenue Service never buys airtime on our favorite show to let us know about all of the wonderful benefits associated with paying our taxes. We have to buy the products and services these types of entities offer or suffer the consequences. These kinds of organizations do not have to market their products to the masses. Not in the traditional sense at least.

The rest of us, one way or the other, must engage in sales and marketing. When taking our products directly to folks that may have a need or want but weren't actively looking for a solution, we must sell.

Enhanced perspective

So, what does it mean to sell? Or rather, what is the difference between the way we sell and *marketing* in general? I cannot blame you if the distinction between the two seems a bit fuzzy to you or any other individual. Like many generally used terms, these are often, even among the elite pros, used interchangeably.

When we - in a narrow sense, or broadly -

make available the information necessary to understand our products and how to consume them, we are engaged in marketing. That is if we are actively investing our monetary resources to show our messages consistently to those who may be inclined to gravitate towards our brand's value proposition.

One can say that sales, as an act or set of actions, lives at the intersection of those who want to know more and the actions we must take to actively guide these folks down the path we desire. The path that (as a percentage of the overall number of prospects) leads to a purchase, or subscription, or donation. This of course depends greatly on your line of work/business.

The "Friends and Family" paradox

The greatest misconception I have seen among other sales professionals, again, typically within the ranks of folks just starting out is that one through leveraging our personal relationships can sell stuff. The idea that we can reach out to folks we know and sell them products and services just

based on our personal relationships might leave you with some sales, but definitely fewer friends. So, can one sell to friends? Sure! The idea though is to reach out to folks you know will see value in what you are offering. Makes sense?

As I am sure you, right now if asked, can make a list of folks you know that - based on their needs- will find your product or service useful. I have no doubt that you will start to create a system that will include calling scripts (yes, even for your friends), steps to follow to make a sale, and so on. You will, I have no doubt, be successful by using the approach I am suggesting here to reach out to your friends.

But the question is: How do you know which of your friends to reach out to? How did you reach the conclusion that John and Mary will see value in these reusable paper towels your company offers? This is because you know them, right? Or more specifically, you know things- facts about them and can reach certain conclusions based on what you know about the couple, correct?

Great! So, how then do we go out and find more couples like Mary and John to pitch your product to? I am sure, at some point, you are going to run out of friends and family to call.

The AI in all of us

This brings me to the central idea behind this book. How do we take data from one or various sources to help us understand the likely needs of our prospective customers? Sometimes even before they know they have such needs.

“Some people say, "Give the customers what they want." But that's not my approach. Our job is to figure out what they're going to want before they do. I think Henry Ford once said, "If I'd asked customers what they wanted, they would have told me, 'A faster horse!'" People don't know what they want until you show it to them. That's why I never rely on market research. Our task is to read things that are not yet on the page.” - ***Steve Jobs***

Of course, both Jobs and Ford were two of the greatest inventors and salesmen of our time. For a technical person, the Apple Inc. Founder was not shy about getting on stage whenever he could to pitch his latest creations to the world. In fact, his once-a-year product pitch day became legendary among investors, vendors, and consumers.



Steve Jobs Introducing The iPhone At MacWorld 2007

In order for you to transcend the status quo. In order for you to offer unmatched value, you must see the world through the eyes of the pitchman who pitches solutions, not products. We will delve into the essentials of your ideal pitch somewhere

down the line here. For now, though, we must see what the data tells us about our prospective customers. We must try to understand who our would-be customers are in order for us to find ways to communicate our value proposition.

So, as the man said, we do not have to delve too deep into market research but we sure as heck need the available raw data, in this case, about the individuals or companies we are looking to sell our solutions to.

Four

A panoramic view

There are a few ways to look at and categorize those with who you want to communicate about your products. As I was saying, there will be some research-based guesswork involved if you are launching a new venture, product, or if this is your first such direct marketing initiative.

One can help make some assumptions about consumer behavior for example by looking at some obvious data markers.

How effective these pieces of information are at helping you targeted a section of the general populous or industry will be largely based on the kind of product or service you are selling and how well-known such a solution and others like it are to your target audience. Before we start to address the various datapoints you can use to make these marketing determinations, lets first talk about selling based on features and/or benefits.

The benefit of features

Generally speaking, if you are offering a product or service with well-known and understood benefits, or a product with a singular benefit to a certain cross section of your prospects, then one need not embark on an overly expensive journey to unpack all the wonderful rewards your prospects can expect as a result of consuming your offering.

Such a popular product, Like *Whole Life insurance* will come with the added benefit of folks of a certain age knowing why they need to avail themselves of the benefits of having life insurance. Of course, each situation will be unique once you start to engage with each prospect on a one-on-one level.

At that point, you will need your sales system to function in such a way that uncovers the unique needs of your prospect and help create/select a specific level of benefits that addresses their needs. The same can be said for the sale of individual health insurance products. Sure, since most folks understand what health coverage is and why they need it, there are many

twists and turns when it comes to acquiring the appropriate health plan for one's needs.

And having a knowledgeable professional to help guide you through it goes a long way to help you make the right choice for you and your family. The general marketing of such a product however will need no real effort to explain such a product. Not at the outset anyway. Merely incorporating the name of your solution will inspire your target audience to conjure up many ways they feel hey can benefit from your offer.

When selling something new

A new type of product, even if the new product addresses an old problem, you will need to be very deliberate in the type of language used and how you will communicate with your target audience.

In such cases, it is best to communicate the benefits and the benefits alone as this is the only way to help your audience understand the upside to having your product. For example, although you will be able to simply ask an older person if they were interested in looking to make sure they have "the right type of insurance coverage" or if

“they have insurance coverage at all”, you will have a hard time communicating some other product that is unfamiliar this way. In such a case, you will want to lead with a benefit that directly addresses an issue you know your audience has. You might want to ask a question: “Tired of paying high prices for your dry cleaning?” So, you will want to invite your audience member in this case to see how they can “save” on dry cleaning going forward.

Once you have their attention – in any format – then you can take the time to talk a bit more about what your offer is in detail.

What the data tells us

Regardless of what you are offering, you will want to think of which of these types of categories your prospective customers fall into. There are many reasons why folks buy stuff. And as you build a more robust direct selling operation, you will start to uncover the unique circumstances that set your prospects on their path to becoming your customers.

You and your team will become increasingly surgical in being able to select based - on a set of datapoints - exactly who will be a great fit for your products and services. I have no doubt about that.

For now, though, let us talk a bit about some of the buying signals you can glean from your data. Most sales leads or sales data platforms like ours: Salesfully (Salesfully.com) will allow you to extract data that carry - at the very least - these basic pieces of information:

Consumer data

- **Full name** (*First and last names*)
- **Mailing address** (*Full mailing address*)
- **Phone number** (*Landlines with some cell phone numbers*)
- **Gender** (*Male / Female indicators*)

- **Marital status** (*Single/Married/Divorced*)

- **Ethnicity** (*Various major ethnic designations*)

- **Parent indicator** (*Presence of children in household indicator*)

- **Occupation** (*Occupation of head(s) of household*)

- And many more

Business data

- **Name of company**

- **Mailing Address** (Full mailing address)

- **Phone number** (*Main number listed for the company of branch location*)

- **Email** (*Email address of the head of the company or location leader/manager*)
- **Industry**
- **Leader name and title**
- **Annual revenue** (Range for annual revenue numbers for the firm)
- **Number of employees**
- **Many more**

Why we buy

Data extracted from any of the various platforms out there can be used to make certain determinations as to the suitability of your offering. Using sales data and sales datapoints, coupled with the various buying indicators can help power a very robust direct marketing campaign.

Life stages:

Age, New parent, New to the area, New spouse, and income.

These are but a few of the many life changes that often cause us to be on the look-out for new solutions and products. As we go through changes in our lives, we are often forced to start looking at stuff that we may have never once thought of. An older person starts to think more and more about their legacy and how their loved ones will live and thrive when they are gone. A new mom (for the first time) now has to, for the first time in her life, go shopping for a whole range of related products and services. And the list goes on. I am sure, as you look at the dynamic nature of your offering, plus the datapoints present in your data file, you will be able to come up with some ways to help extract data that will put you in the enviable position of being able to specifically target folks who may be in immediate need of what you have to offer. Life stages will for the most part be the largest category within which most folks acquire

stuff. Especially those that have to be sold to. There are a few other obvious reasons folks will be open to hear more about your products and services when you reach out to them via mailers, phone calls, etc.

Mandated

This is pretty self-explanatory. If your firm sells tax preparation services, then you know that although you must connect with your audience to communicate the reasons that they should choose you over your competition, the basic need for your service will not be up for debate since we must all pay our taxes, right?

Same concept will apply if you -for example – offer vehicle registration services. Sure, you will want your location to be a factor, and will want to market to the community the fact that you are at say 115 Main Street and offer these XYZ services.

You will have no need to explain to folks the viability of your services. In these particular circumstances, you are able to reach out to a broad section of the general population to help get

your offer across. I would also mention, as part of the "mandated" category, work or business-related tools and services.

We see this point playing a larger role in the software space. Most companies will pay for your b2b tools as part of their profit-making efforts within their own firms. Of course, your job will be to communicate with the decision-maker why your CRM platform or video conferencing tool offers more value than Zoom. Here, you will be addressing many pain points including the question of whether your tool eases some inconvenience associated with their daily business-related activities or is a must have in order for the business to function.

For example, if I run on an ecommerce business, then having a website and all the services that make it possible for me to show my products online and collect payment for said products will not be optional or up for debate.

Emotional

Exclusivity/envy, movement/cause (tribal), Pleasure, pain, nostalgia, Social image, or status etc.

One of the more common reasons folks make buying decisions, one way or the other, falls under the "emotional" category. It is often challenging to glean from your sales data such specific needs. In these types of cases, your goal will be to make some assumptions based on the data available to craft an initial message that directly addresses the most common emotional reasons why those on your contact list might be interested in your offer. As I mentioned before, this will be reason to use messaging that helps directly address the (emotional) benefits your prospect can derive from the consumption of your product. You will for example want to employ the sense of nostalgia – targeting folks of a certain age and ethnicity when selling for example old R & B hits from say the 70's and 80's.

A sense of status or exclusivity. Countries like China and South Korea have over the last ten or so years seen an upswell in their respective

middle-to-upper-class populations. Folks who previously may not have had access to luxury items now find themselves in the position to travel to exotic locations, buy bigger homes, drive expensive cars, and so on.

The thing about having wealth is that most love to show it off. Here, you can draw on the perfectly normal tendency we have as humans to let folks know where we are in the socio-economic pecking order. Selling status and exclusivity can be (when appropriate) a very effective way to offer your products and services in a way that captures the attention and wallets of a specific sector of the market. Within your raw sales data, you will certainly have all the information you need to help position your company and its products and services to meet the needs of the high income-earners in your community.

Lifestyle

Convenience, health, and wellness, etc.

There are those who, for one reason or another, choose to live their lives a certain way. Among

this group are those who must consume certain services and products based on their lifestyle choices, underlying medical condition, and so on.

Since you will not have access to the specifics surrounding any prospect's lifestyle choices or health profile, you will want to use certain available pieces of information such as age, gender, geographical location, income levels, etc. To help you make some educated guesses as to who will be ideal to pitch your lifestyle or health-related products and services to.

Five

Connecting the dots

Although access to quality data can be and usually is a quintessential part of any successful direct-marketing or direct outreach effort. Any small business owner or entrepreneur looking to be able to extract a decent ROI from such an initiative must go the extra mile to do so.

It is important that you, the business owner and/or sales manager, do not look at your sales

data or sales leads - be it B2B or B2C - as the silver bullet needed to help derive positive sales outcomes.

It is essential to view your sales data, and access to fresh quality sales leads as the fuel needed to drive growth as far as your sales activities go. One need not skip the various proven steps required to attract and retain profitable client-relationships via direct sales.

The more you know

Having access to pertinent details about an individual, whether as a representative of an organization or a consumer with whom you wish to do business, allows any skilled sales professional the advantage of being able to not only offer suitable solutions but to also anticipate one's needs and communicate in a precise and soluble fashion. Your sales scripts and/or ad copy will be crafted in a way as to allow your prospective customer to fully understand and appreciate your value proposition as it relates to their individual or business needs.

You and your team, in this context, will

have the full advantage of being able to address all the pain-points associated with those who (typically) seek what you are selling. Data, even as mundane as age, gender, etc. When taken together and worked through your sales infrastructure can help illuminate many of your sales representatives to the unique needs of your sales prospects, both obvious and not so obvious.

For example, we know as one gets to be a certain age, there are needs, wishes, and concerns that only become clear and imperative to us during these and other stages in our lives. Once you are able to access specific demographic and psychographic data about an individual or company, you are able to present your products in a more palatable way.

A mother of three, age 35 - 45, married living in a condo, with a "good" credit rating (730+), making over $100,000 - all data points that can be accessed via any of the unlimited sales leads platforms - will probably be interested in financial products like most folks: Life insurance,

loan products, and so on. She might however be more inclined to consume products with lower interest rates. She might also be a great candidate for investment products that are built to fund a child's education, future purchase of a bigger home, and so forth. When reaching out to such a candidate, it helps to build most of your offers around that which she cares bout the most: The family, and the specific concerns someone in her income bracket might have.

Getting to know your audience

I am sure it is quite unnecessary to tell you that marketing, effective marketing, goes way beyond just gathering contact information about a person or business and inundating them with information about your products and/or services that solves problem X.

First, we will need to know if this person has this problem or knows someone who does. We need to try to anticipate while carefully trying to understand the perspective (day in the life) of one who has such a need or want.

We will need to get to know a little bit, no scratch that, a whole lot more about our audience to be able to truly connect with them and present value. There are many ways to do this.

Larger organizations spend hundreds of millions of dollars to try to understand every aspect of the lives of those they wish to sell to. I am talking about focus groups, peer studies, surveys, and so on. As a matter of fact, through careful research is how back in the 1950s, various soap companies realized that various household cleaning products including soap could be sold to housewives via overly dramatic mid-day radio shows. Hence the name Soap Operas.

Since our content is meant for smaller, even solo-operated organizations, I am sure your budget might be a bit more prohibitive than that of say, the folks over at Pepsi or Facebook.

The basics

This, however, does not mean that you too cannot come up with your own unique way of getting the

data you need about your ideal customer and creating various customer profiles and scenarios to help you reach more folks who fit the mold. As time goes on, you will get more efficient at doing both.

For now, you just need to ask yourself these three questions: Where would your ideal customer or client fit in as far as their age, gender, marital status, income level, ethnicity, and so on? These are the basic demographic datapoints one needs to know about the ideal persons or person who is more likely to buy one's stuff.

What is the best way to reach your ideal customer? and what are the unique pain points associated with the reason they would want to avail themselves of your product or service?

When you set out to understand who your ideal customer is, as I said before, it helps if you have had some years of transactions under your belt. Hundreds, even thousands of active customers here and there.

If you are in this unique position and your interest in this content is to get some insights and

ideas on how to streamline your direct-marketing campaign(s), or perhaps to help you understand your customers better for the sole purpose of developing new products and services for them, then you need not look any further than your own customer data to try to get a better understanding of who your patrons are.

For the rest of us, as I said before, we can engage in an analytical try and error exercise to try to better understand our entire business through the eyes of those who spend their cash with us.

Six

Love languages

Disseminating/broadcasting various parts of your direct-marketing message/offer to your audience can be an intrepid task. Success in this realm depends on a set of various factors and getting many of these factors to work together in a way that generates viable sales leads for you and your team.

However, much of your success in getting the word out about your products and services, and connecting with an audience likely to take the set of actions needed to consume your offer, will depend on getting your message across to connect with your audience as well as (of course) the likelihood of your audience being "a good fit" for your offer.

Much can be said about one's ability to

assemble a list of likely prospects. Whether cold-calling or sending out mailers, any successful direct-marketing initiative will need to have at its core a large list of likely customers to reach out to with your message of value, convenience, solutions, and so on. I think most sales professionals understand this to be an essential, inalienable part of any respectable sales campaign.

Most sales professionals also know that they must connect in a way that makes sense to those who will be most likely to become a customer. We must use all available resources to help communicate with our audience in a way that compels them to stop and take a closer look at what we are offering. Such is the case when it comes to any Interruption marketing effort.

Welcomed distractions

One must understand that any type of unsolicited sales or fundraising effort is - in one way or the other - some form of interruption marketing. Whether your ads show up on social media or via

email campaigns, once you are, as part of your overall marketing strategy, reaching out to folks who may, or may not have given you permission to contact them with a specific offer, you are in fact asking these folks to stop whatever they are doing to check out what you have.

It goes without saying that this form of marketing differs from when folks look-up a specific product or service associated with your company and take the step to reach out to your firm directly to learn more.

Or when folks search for your firm and/or offering on Google and visit your website before contacting your team. As a result of such differences, one must be very deliberate in how any such marketing effort is conducted. For the most part, armed with the intel gleaned from the various data-points associated with your leads, you can craft a message or messages to be delivered over the phone, on Facebook, or via email message.

You will need to create value in many ways to help captivate the attention of your audience.

We will get into the various aspects of each outreach effort to help clear things up a bit. For now, know that whether using actual pictures as part of your digital campaign or employing telemarketing as your delivery channel, you must paint a vivid picture (to your audience) clearly illustrating the benefits she can derive by using your product.



A picture says a thousand words

This is true. Especially when we cannot use words to connect. When we can though, well, using

words is always better. Some businesses find that using content other than text works really well for what they sell. In certain formats and on certain advertising platforms, you will find that your rich media assets: Videos, graphics, etc. Must both capture the attention of your audience and also tell them a bit about your product.

Watching a video of a Polar bear (even with the sound off) chugging a bottle of Coca Cola tells you that Coke is often served cold and tastes great. At least, that's what I get out of those cute commercials. As sales professionals, although, in today's hyper-digital environment, we must all try to go beyond traditional direct-marketing tactics and try to connect with our potential customers via social media, email, search marketing, etc.

We often rely heavily on our ability to connect with our prospects one-on-one to tell them our brand story. For us, words, presentation/positioning, these are all we have.



In the next chapter, I will delve into some of the advertising channels that have worked to help us connect with folks at various stages and ages in life.

For now, let's talk a bit about how to connect with your prospects via words and various other ad assets, and how to best curate these words, text, copy to capture the attention of your prospects, and to help them understand how your product can help enrich their lives.

It doesn't hurt to digital

Digital marketing, especially social media, has become quite ubiquitous regardless of the nature

of one's business, product, or service offering. Even if you believe your product and/or service is more effectively marketed via traditional means, there are many valid arguments that can be made underlining the versatile nature and universal utility of social media marketing.

There are many reasons for you to have some kind of social media or email marketing campaign to go along with your telemarketing or direct-mail efforts. Even if your line of products requires one-on-one demos or extended phone conversations in order to help your prospects realize the value your offerings possess, you can use other, more digital forms of marketing, perhaps, to help generate hot sales leads.

It is clear to see why you are best served to have some kind of simple, say, Facebook ad to generate traffic to your website. You can then show more information about your offering via video-based product demos, testimonials from other customers who have used your product and then direct your visitors to call or fill out a form (handing you their mailing addresses, phone

numbers, etc.) to receive more information.

Social media platforms: Facebook, Twitter, Snapchat, plus smartphones, email, these are all tools, gadgets, and gizmos used by a wide spectrum of folks. Folks of all ages, backgrounds, and geographical locations now all use these modern communication tools.

Rich media

We will not spend a whole bunch of time talking about how to connect with your audience via social and other digital means. There are many books out there that address this very topic in great detail. I will, however, like to touch on some very simple tips to keep in mind if and when you decide to incorporate social or email into your direct-marketing system.

Video is always better

Rich media plays a significant role in communicating the central idea behind an ad. This is especially true when using any of the various social media platforms out there.

Strategically creating or selecting relevant graphics and videos for your ad should be a task that you approach with all the seriousness it deserves.

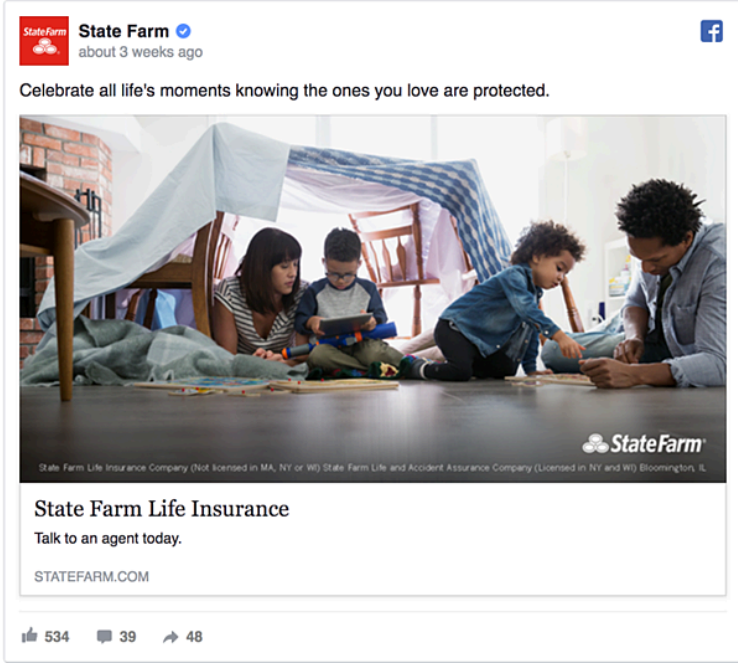
More companies out there are starting to realize the power video has when communicating and connecting with audiences on social. In fact, 87% of online marketers use video content. You will want to tell a story and connect with your intended target even before they actually read the text part of your ad. Your photos and videos will play a vital role here.

For this reason, you will want your rich media assets to:

Mirror your prospects' specific predicament

If your product or service is meant to address a specific pain point, you will want your videos or graphics to show someone who looks like your intended audience having or appearing to have the same issue.

If your ad is meant to address, for example, the need a parent has to protect their loved ones, then your ads should show folks who look just like your typical customer going through the various activities one does when in their unique position.



Concise story

There are those who use videos within their social ads as merely a backdrop to a central point. Here, stock videos with some text overlays work fine.

There are also folks who go the extra mile to create a well-thought-out video ad, rich with dramatization, actors, etc.

One, I think, can have an impact by simply using carefully selected stock footage with on-screen text or voice-overs. If you choose to go this route though, you must do your absolute best to communicate value or at the very least, your call-to-action within the first few seconds of your ad.

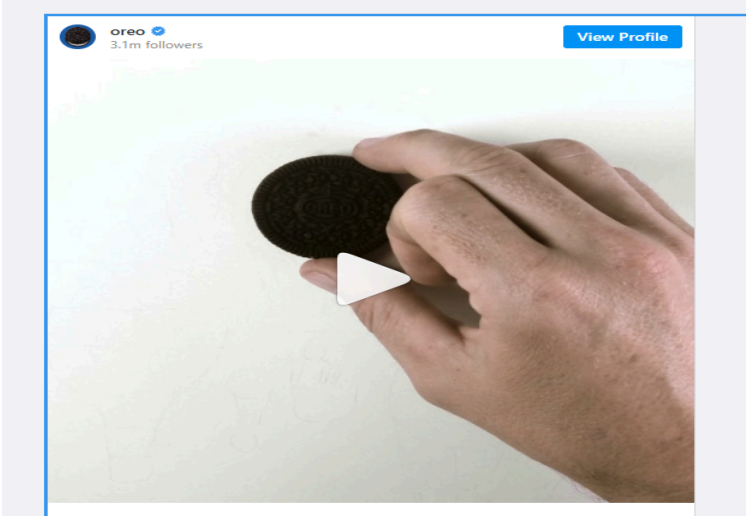
Keep your video short and sweet. Get straight to the point of the ad. Briefly run through all the reasons why your intended audience should take actions XYZ as stated in your ad.

Choose your platform wisely

As far as video ads go, each social media platform and Google ads have their own requirements. Since you will want to employ a multi-channel marketing strategy. One that will help broadcast your brand offer across many different audience demographics, you will want to go to great lengths to ensure that your video fits within the

constraints of each platform while maintaining legibility.

Facebook, for example, allows video lengths up to 240 minutes. While Instagram restricts your video length to 30 seconds. Google's YouTube allows much more flexibility when it comes to video ads. Ample research must be done to ensure adherence to all rules.



Include a Call to Action

Actions are what life is all about, right? One must take action to avail themselves of all manner of benefits in life. The same goes for your ads.

Your audience must - as a result of a clear call-to-action - know exactly which steps they must take to be able to begin the process of acquiring your services, or at least to hear more about your offer.

The final nudge in any sales process, even in face-to-face sales is key. Always be sure to include a well-thought-out call to action when cold calling or even with your digital ads.

One that is easy to take and helps your audience navigate any complexities that may or may not exists within your client acquisition process. "Learn more", "Call 1800-452-452 for more information", "Start your free trial", these are all great Calls-to-action.

Notes

https://blog.thomasnet.com/emotional-connections-through-data

https://www.goodreads.com/quotes/988332-some-people-say-give-the-customers-what-they-want-but

https://www.youtube.com/watch?v=x7qPAY9JqE4

https://medium.com/new-markets-insights/the-10-reasons-people-buy-new-products-1489aad9b1c9

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https://en.wikipedia.org/wiki/Interruption_marketing

https://www.socialbakers.com/blog/social-media-video-tips

https://www.wordstream.com/blog/ws/2017/03/08/video-marketing-statistics

RECOMMENDED READING

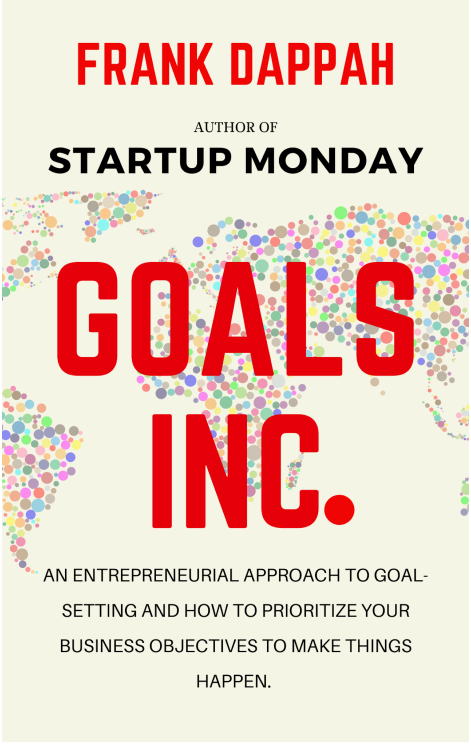
Some of the ideas and concepts discussed in this book can be further explored and fully researched by reading the following books.

Full disclosure: Some of the books mentioned here are by authors who belong to the same publisher as me.

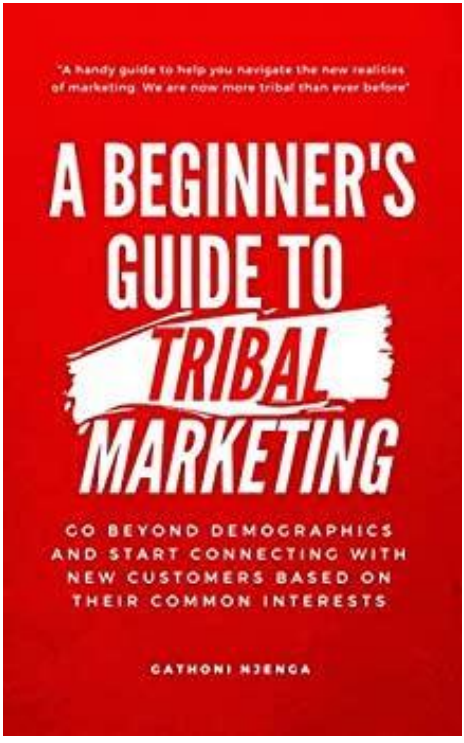
My only motive in recommending these books is to help you acquire the resources and knowledge I feel will help you immensely when it comes to starting and growing your existing firm or idea for your next startup company.

ENJOY!

GOALS INC.: An entrepreneurial Approach to goal setting and prioritizing your business objectives to make things happen.



THIS BOOK IS ABOUT GOALS! This is a sentiment

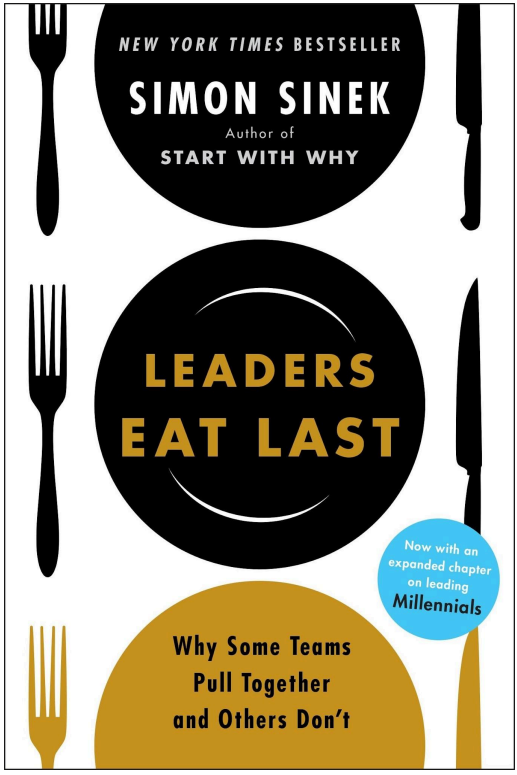


you will see repeated over and over again in this book. Goals Inc. Is the latest installment in a series of books by the Author aimed at helping Entrepreneurs from all walks of life accomplish their business objectives.

A Beginner's Guide to Tribal Marketing: Go beyond demographics and connect with new customers based on their shared interests.

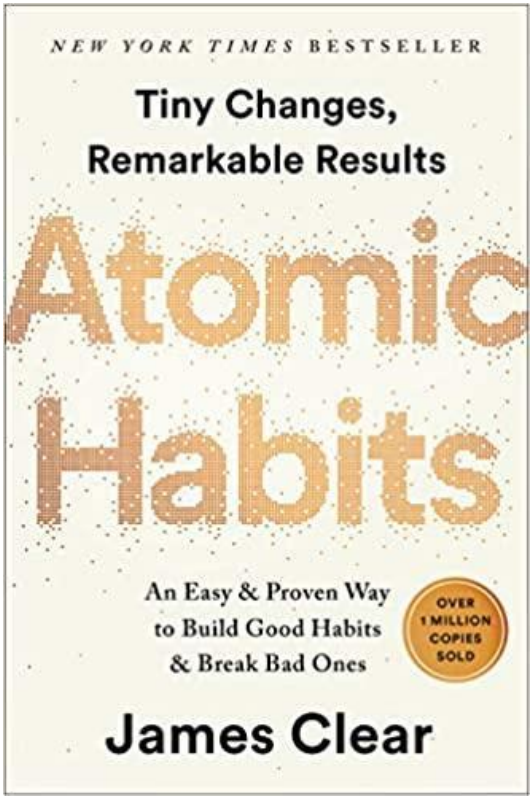
A beginner's guide to tribal marketing lays out the fundamentals of social and community-based marketing. This short and straight-to-the-point book can serve as an introduction for any small business owner or marketer to the new age of marketing: Tribal Marketing.

Leaders Eat Last: Why Some Teams Pull Together and Others Don't



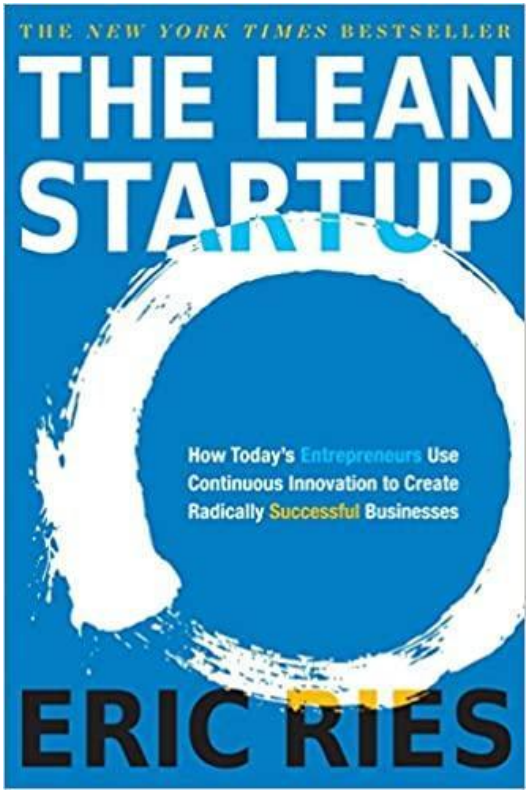
Imagine a world where almost everyone wakes up inspired to go to work, feels trusted and valued during the day, then returns home feeling fulfilled. This is not a crazy, idealized notion.

Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones



No matter your goals, Atomic Habits offers a proven framework for improving--every day. James Clear, one of the world's leading experts on habit formation, reveals practical strategies that will teach you exactly how to form good habits, break bad ones, and master the tiny behaviors that lead to remarkable results.

The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses



Eric Ries defines a startup as an organization dedicated to creating something new under conditions of extreme uncertainty. This is just as true for one person in a garage or a group of seasoned professionals in a Fortune 500 boardroom.

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ISBN: 9798699955305

Cover and Interior design: Ostrich Publishers

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