

MARKETING AUTOMATION

FROM A SMALL WINERIES PERSPECTIVE

WHO AM I?

- Waiter from Dallas who fell in love with wine as a teenager



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Passion. Innovation. Liquid Art.

ModusWines.com



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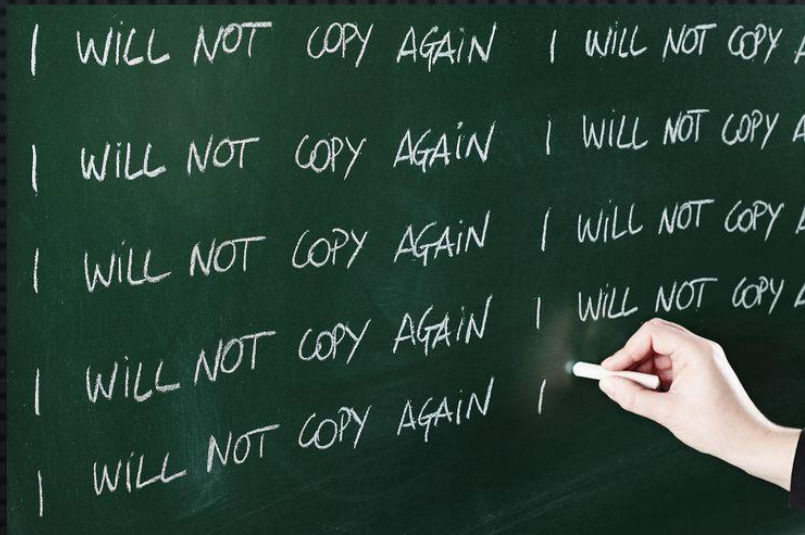
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- Lead generation slowed and my business tapered off



AND THEN I DISCOVERED
MARKETING AUTOMATION





Infusionsoft®

Certified Consultant



I DON'T THINK SO

I DIDN'T IMMEDIATELY
BUY IN

The learning curve was steep as there are a ton of products to wade thru... each different in their potential fit for the goals of the business









zapier



MyFusion Helper





WICKED REPORTS





SharpSpring

I didn't want my
communication
to sound robotic





Integrations to the wine world
are scarce...

INTEGRATION





BUT IN THE END...



DIGITAL MARKETING
AUTOMATION PROBABLY
SAVED MY BUSINESS

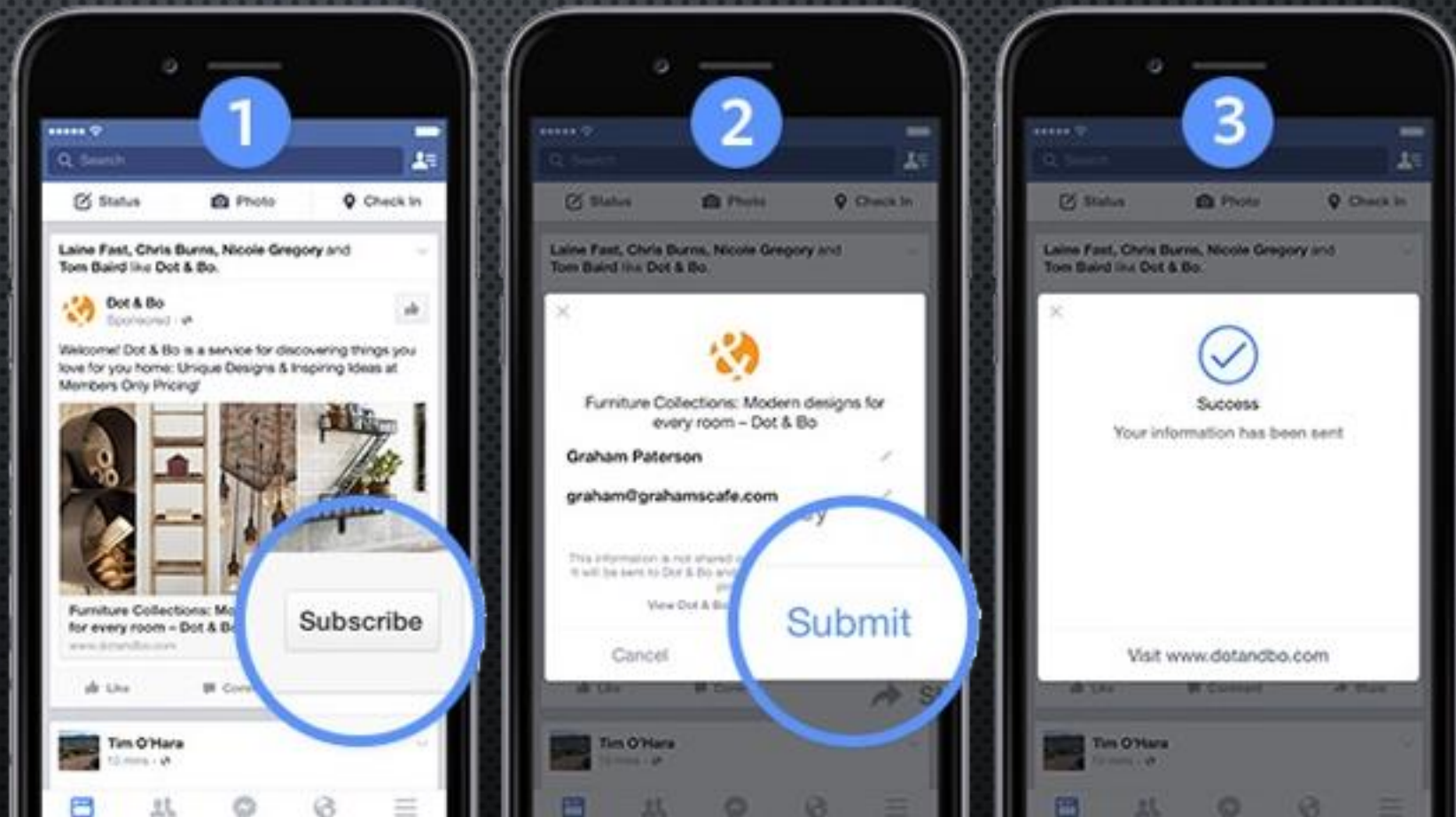


Here's an
example of
how



LEAD GENERATION / LIST BUILDING

- FACEBOOK LEAD ADS




LEAD GENERATION / INDOCTRINATION

- NEW CONTACT DROPS INTO CRM AND TRIGGERS SPECIFIC AUTOMATION CAMPAIGN BASED ON WHICH AD THEY CAME IN THRU











Quick Search

Actions ▾ Edit Fields... Advanced Search >>

1-1 of 1

Jason Moore  12:43 PM (PST)

Phone 1: (555) 555-5555 (Work) Email Address 2:
Email: jason@echodtc.com City (Billing): Napa
State (Billing): CA

close

Tags Apply Tags

Applied	Tag	Category	Remove
2/2/18	New Lead On Boarding START	No Category	x
2/2/18	Mailing List	Modus Operandi	x
8/21/17	Promo Eligible	No Category	x
8/21/17	New Lead On boarding - Starter Bundle - Open Promo Door	Trigger	x

DON'T FREAK OUT!!!




LEAD GENERATION / INDOCTRINATION











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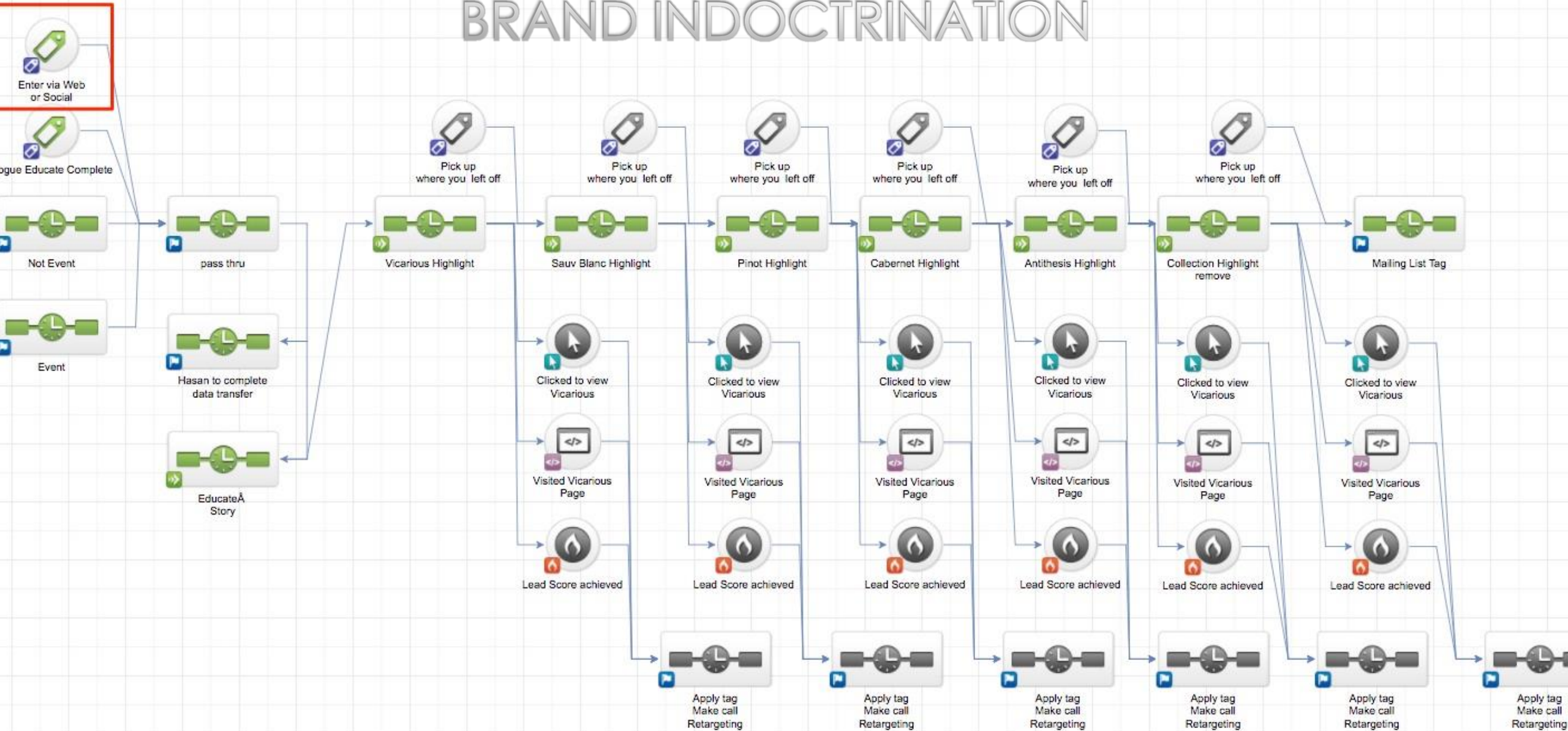
         

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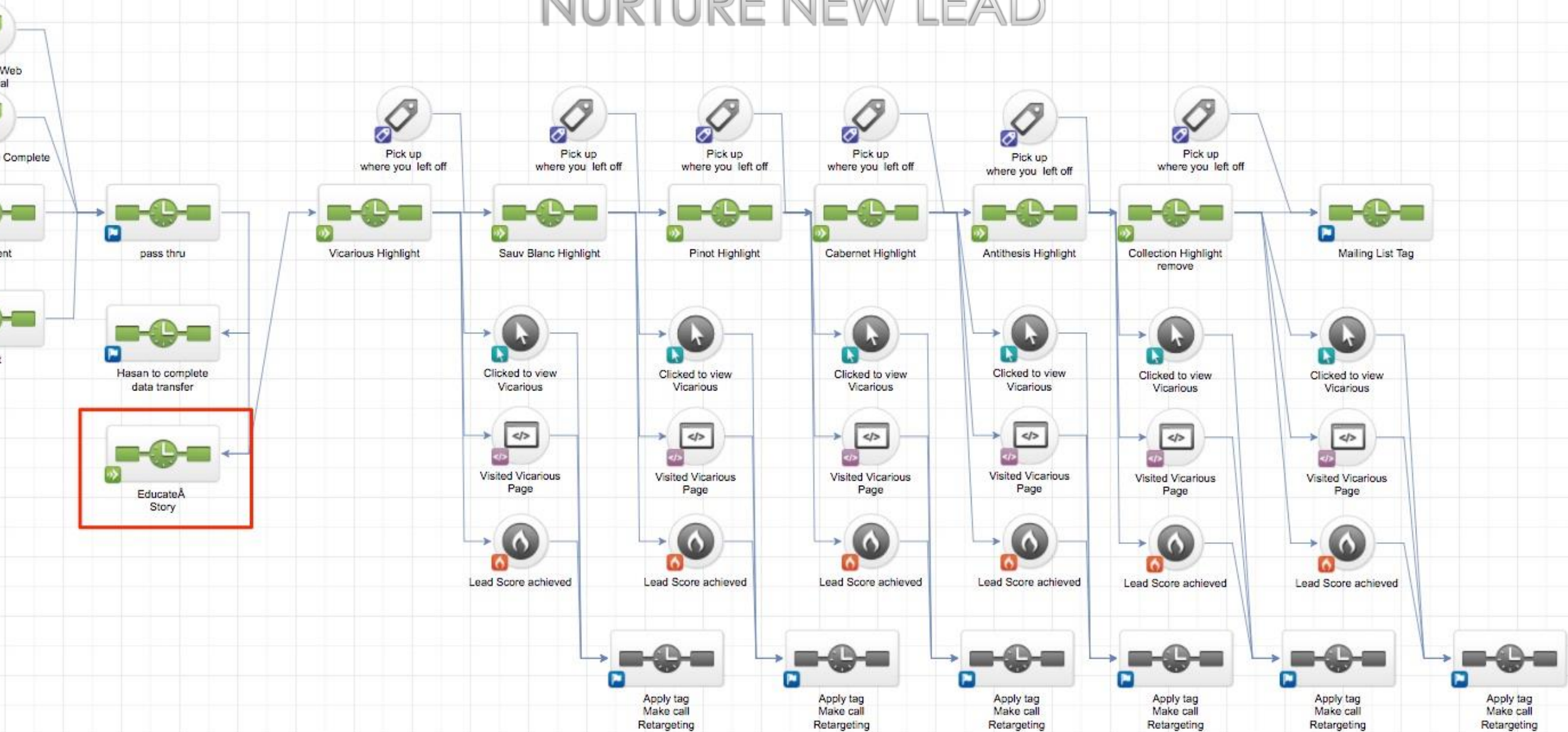
Tags [Apply Tags](#)

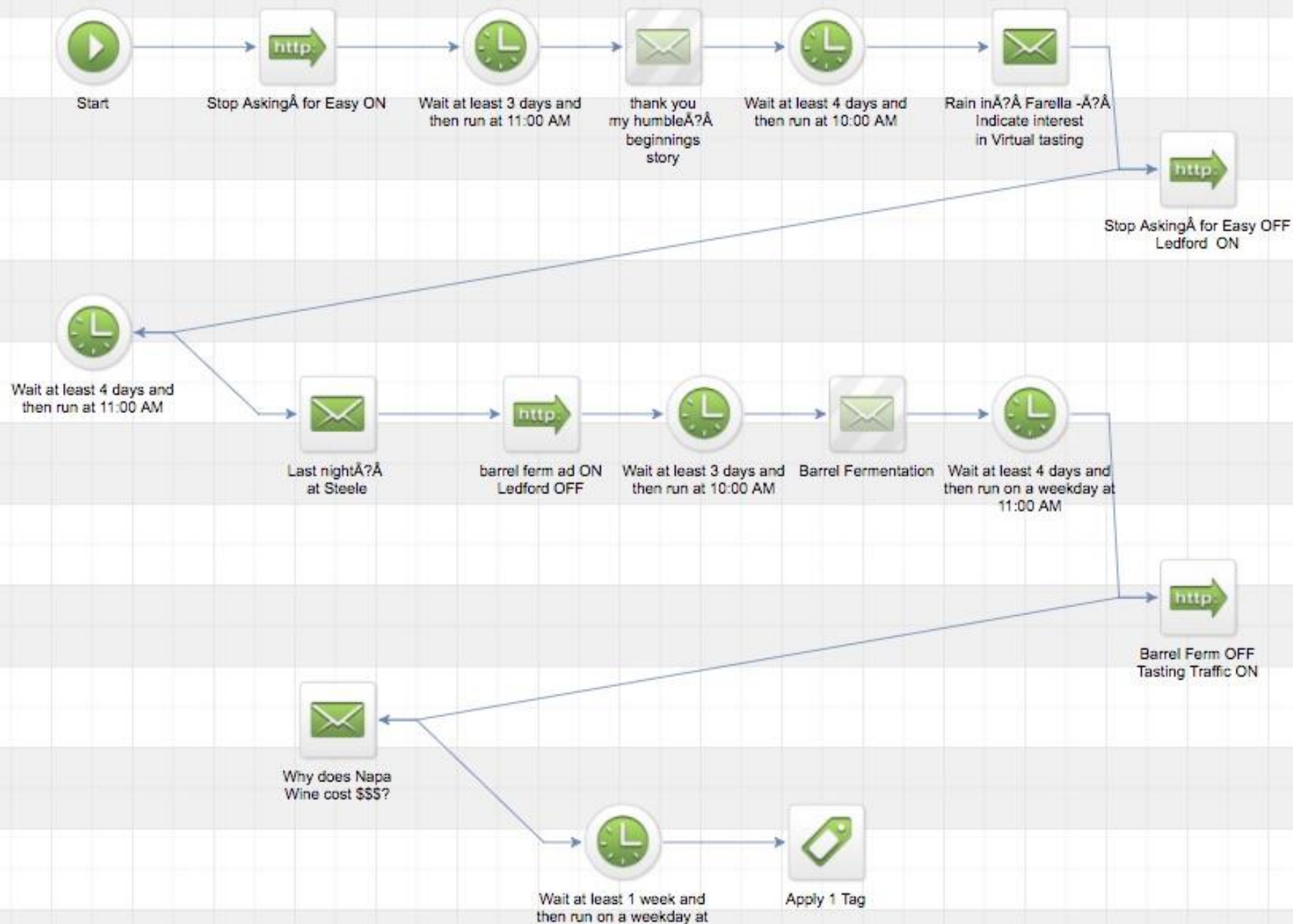
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BRAND INDOCTRINATION

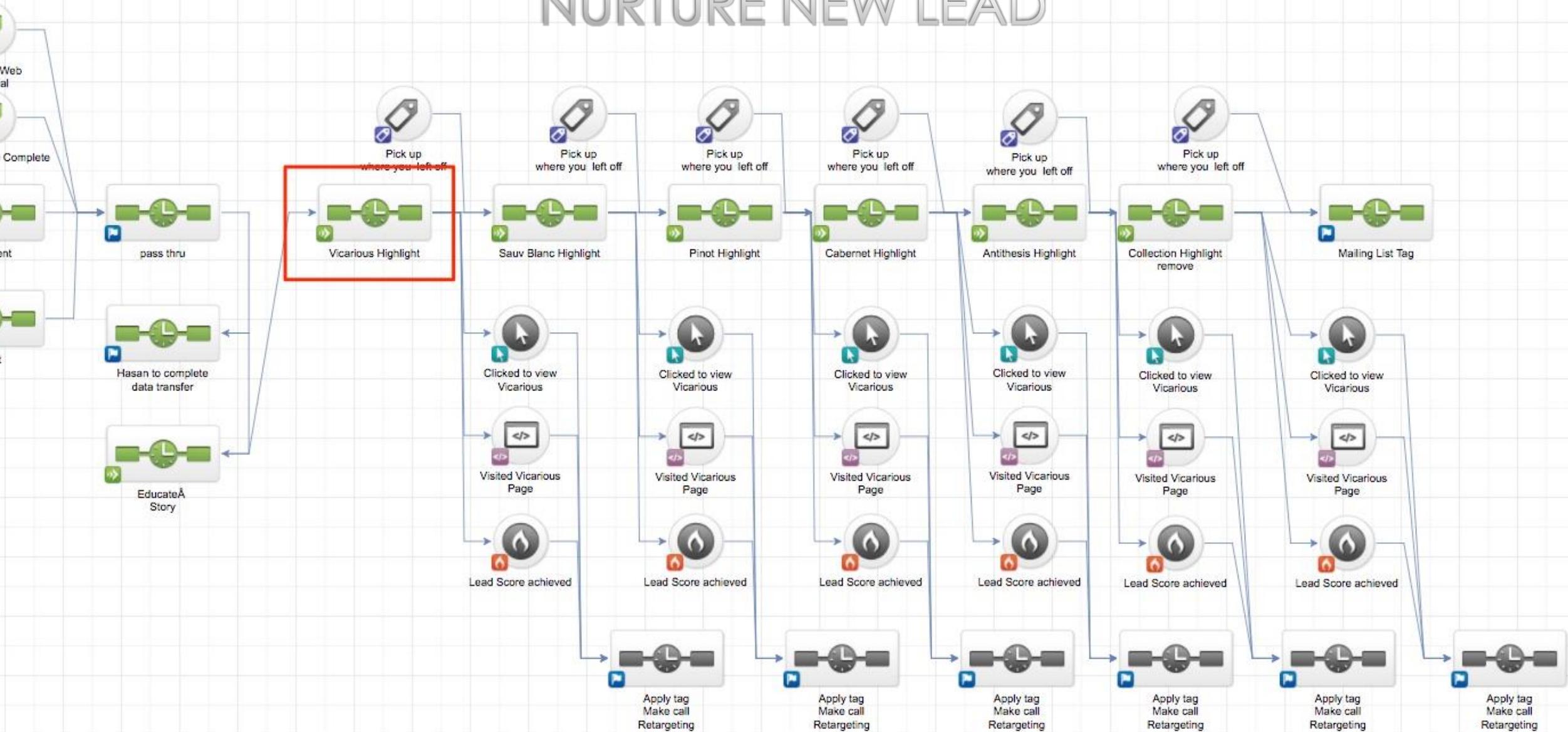


NURTURE NEW LEAD





NURTURE NEW LEAD



INSIDE THE SEQUENCE

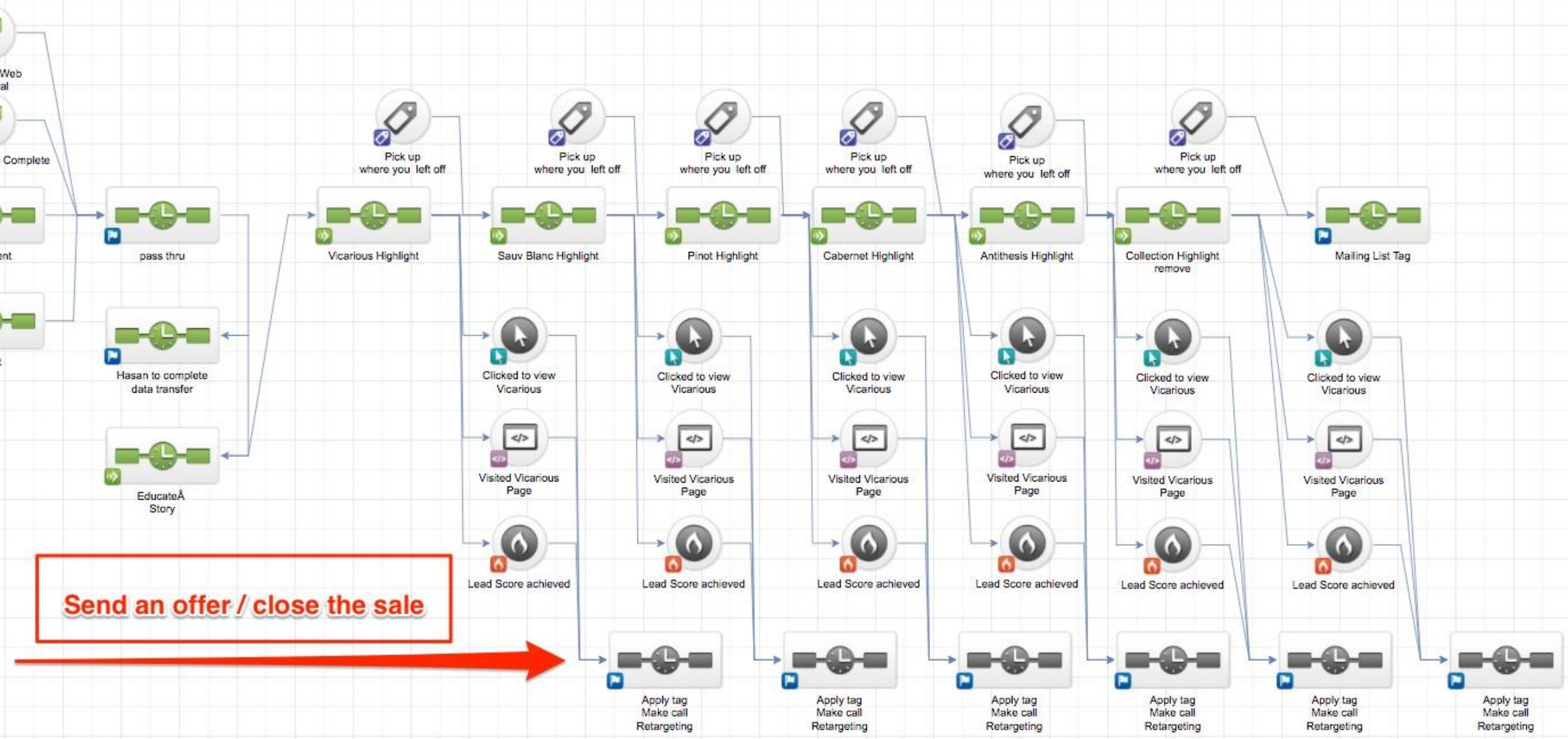




**I DON'T ALWAYS WANT YOUR
ATTENTION**



**BUT WHEN I DO, I USE A
SCREAMING GOAT**





pick up where you left off





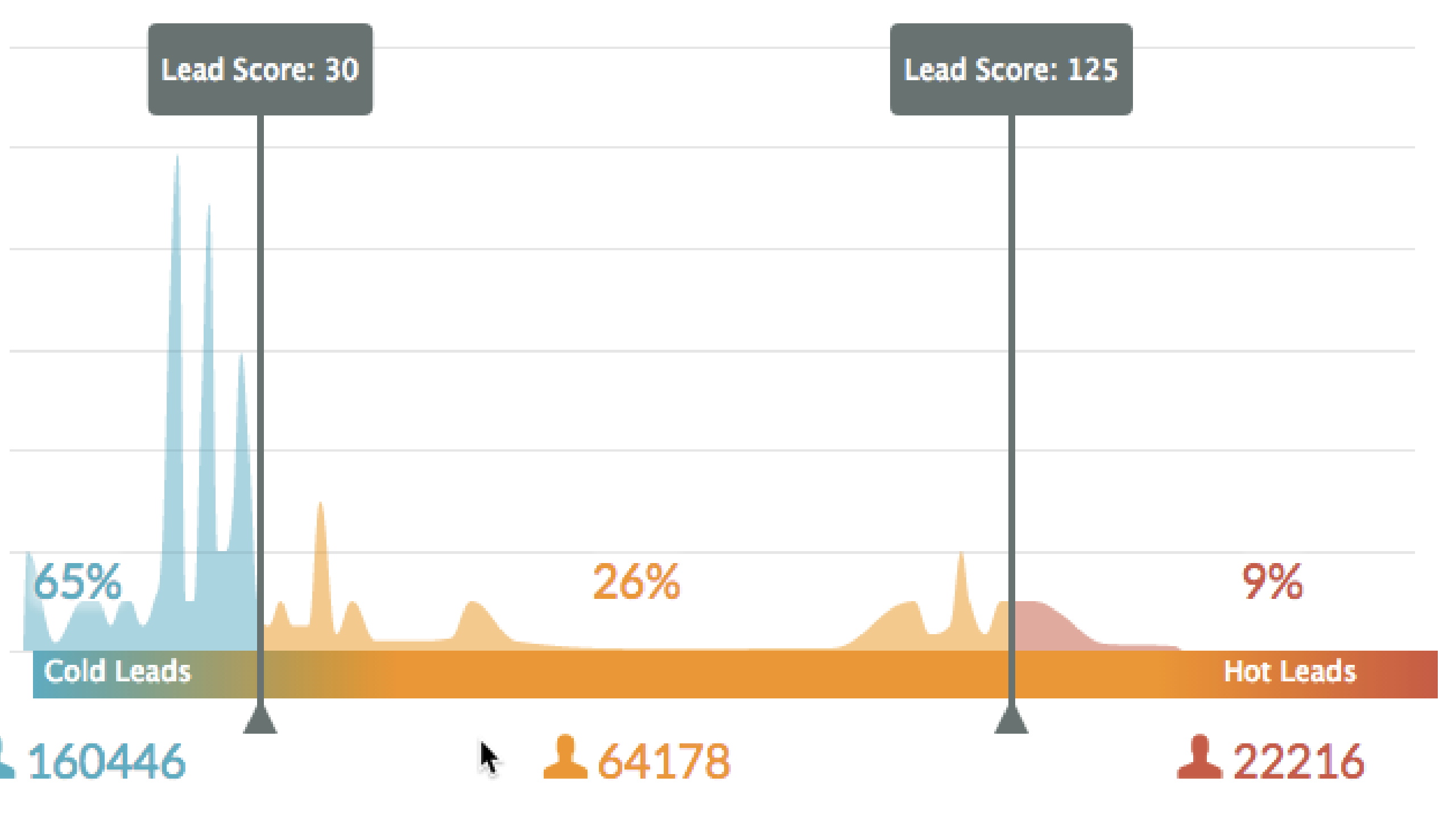






OTHER HELPFUL CAMPAIGNS / FEATURES

LEAD SCORING

























Score is **On** 

100  points equals 5 flames.

☒ Update recent activity when scores reach  

Rules

Criteria				Points	Expiration
If the	Contact's	Activity	contains	Email Open 	10  8  Weeks
If the	Contact's	Activity	contains	Link Click 	10  8  Weeks
If the	Contact's	Activity	contains	Web Form Submission 	20  8  Weeks
If the	Contact's	Tags	contains	Scheduled a Tasting 	25  8  Weeks
If the	Contact's	Tags	contains	Interested in Wine Club 	20  4  Weeks
If the	Contact's	Tags	contains	Club on hold: know the reason  club on hold 	-20  --  Never
If the	Contact's	Tags	contains	Unsubscribed 	-50  --  Never

Configure Score



Choose the score level that will complete this goal:

Score  to  or more flames.

Cancel

Save





Start



Call



Email



Follow up

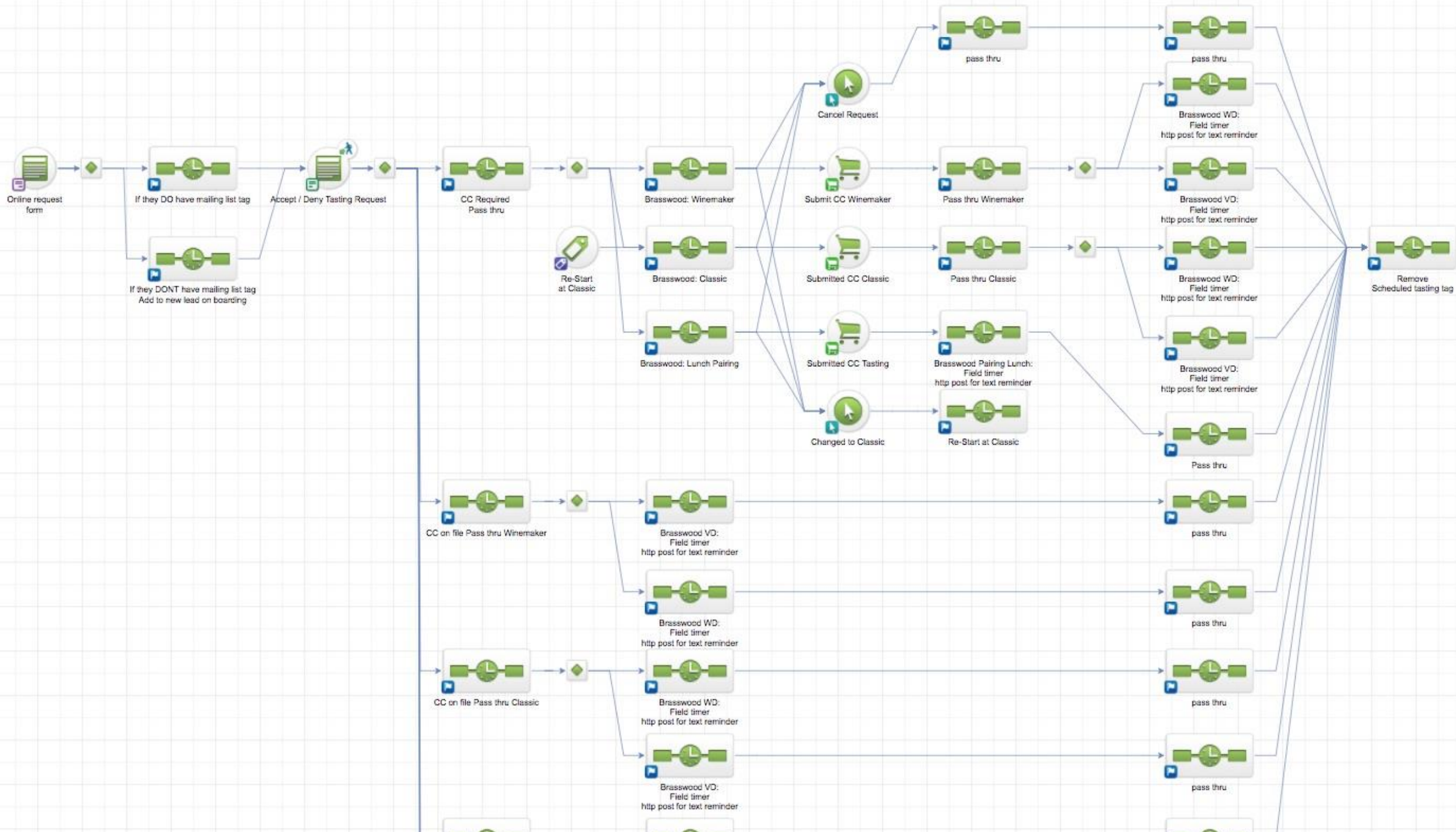


SMS



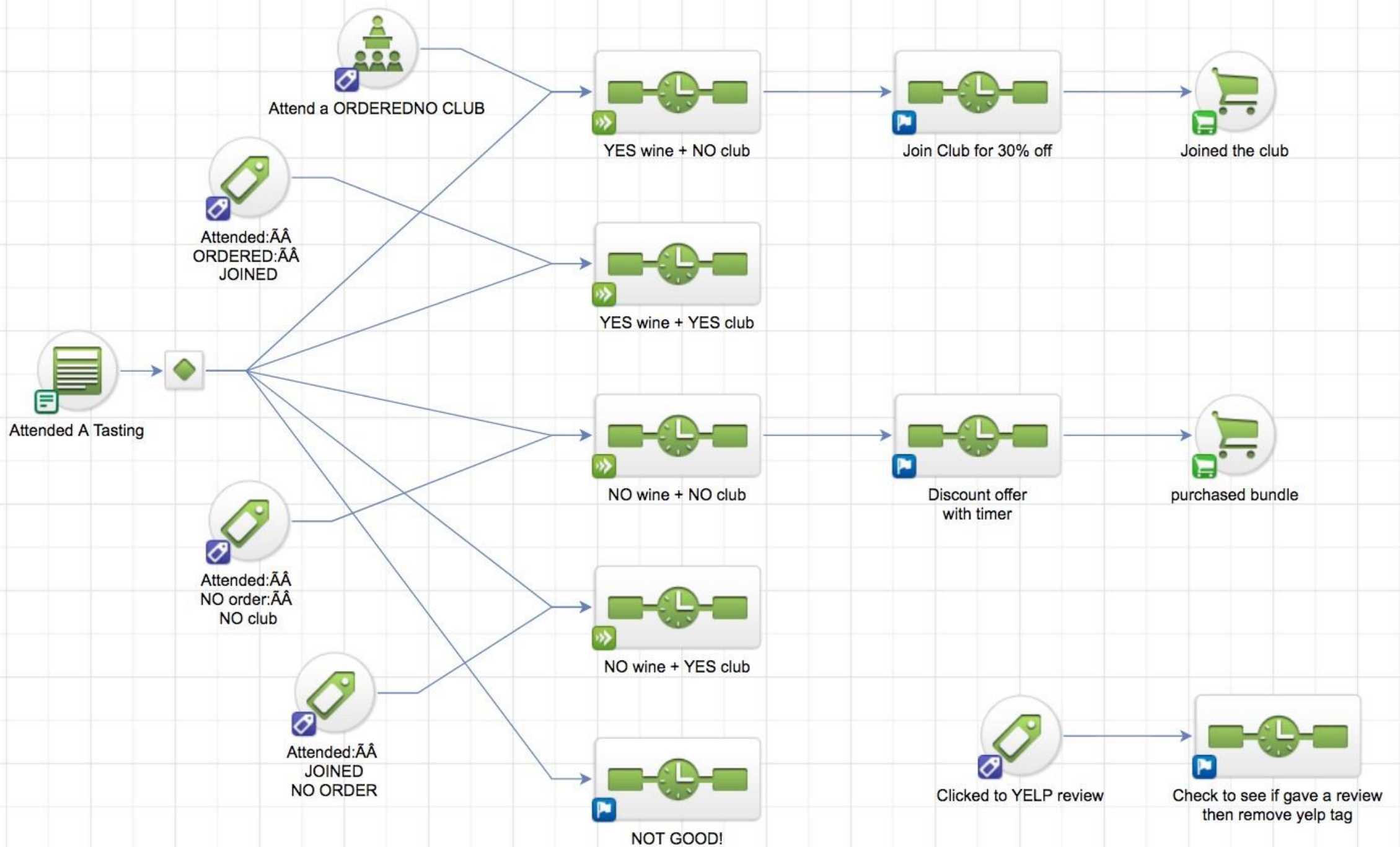
OTHER HELPFUL CAMPAIGNS / FEATURES

TASTING ROOM TRAFFIC



OTHER HELPFUL CAMPAIGNS / FEATURES

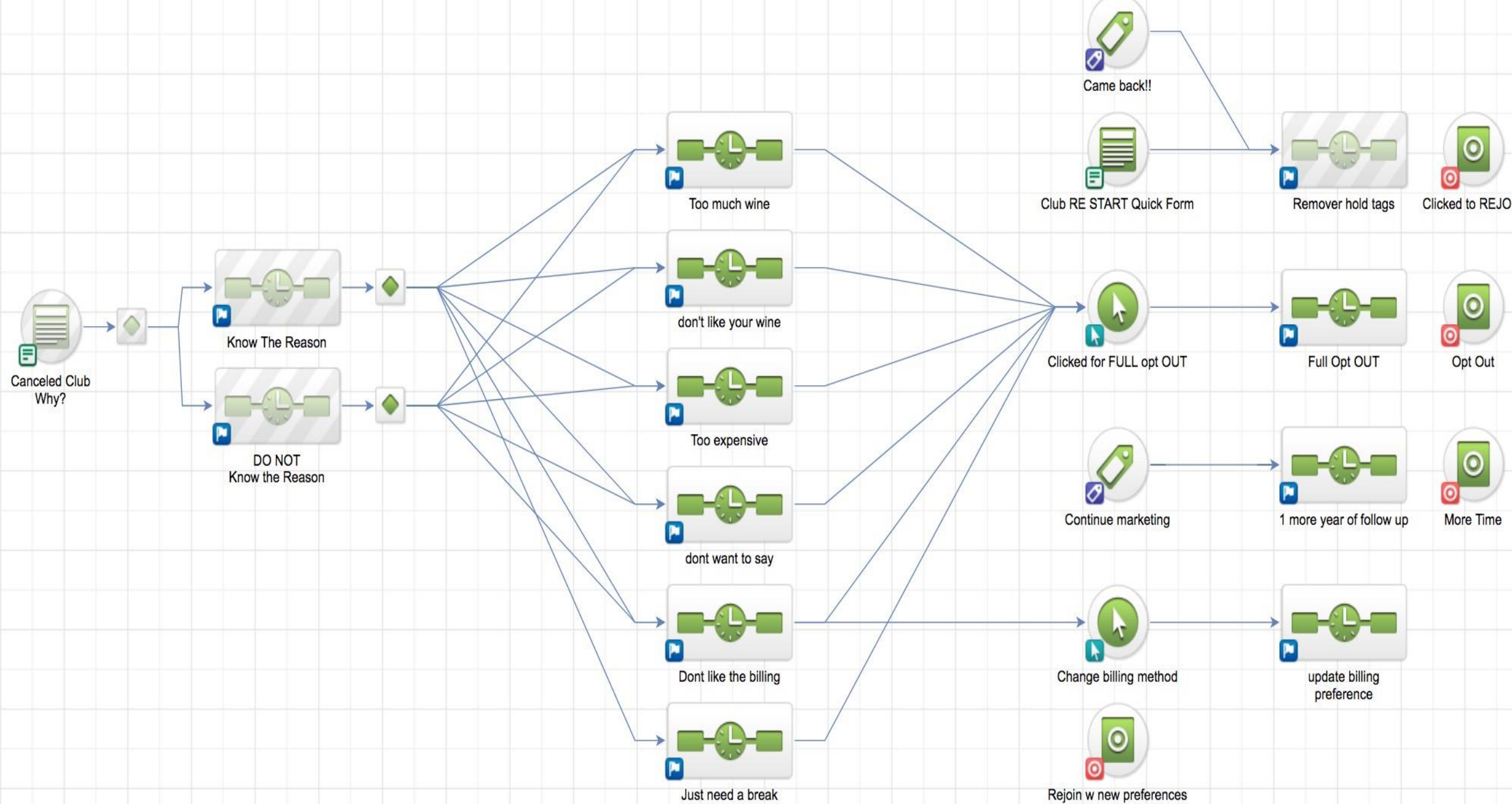
POST TASTING FOLLOW UP



OTHER HELPFUL CAMPAIGNS / FEATURES

RE ENGAGING

CANCELLED CLUB MEMBERS



OTHER HELPFUL CAMPAIGNS / FEATURES

RETRIEVING UPDATED
CREDIT CARD NUMBERS

OTHER HELPFUL CAMPAIGNS / FEATURES

WINE RELEASES

OTHER HELPFUL CAMPAIGNS / FEATURES

EVENTS

INVITATION, DIRECTIONS, FOLLOW UP,
ETC

SO IN SUMMARY... WHAT'S YOUR TIME WORTH?







WANT TO SEE SOME AUTOMATION IN ACTION?

TEXT “AUTO” TO (707)809-5347
AND LETS HAVE A QUICK SMS CONVERSATION



MY CONTACT INFO

JASON MOORE

530.219.6199 CELL

JASON@MODUSWINES.COM

IF YOU'RE INTERESTED IN GETTING
SET UP WITH AUTOMATION, I CAN
GET YOU KICK STARTED

