CLIENTTETHER™

The Franchise CRM

The Lead Nurturing Playbook

Proven Strategies and Actionable Tips to Maximize Conversion Rates

Introduction

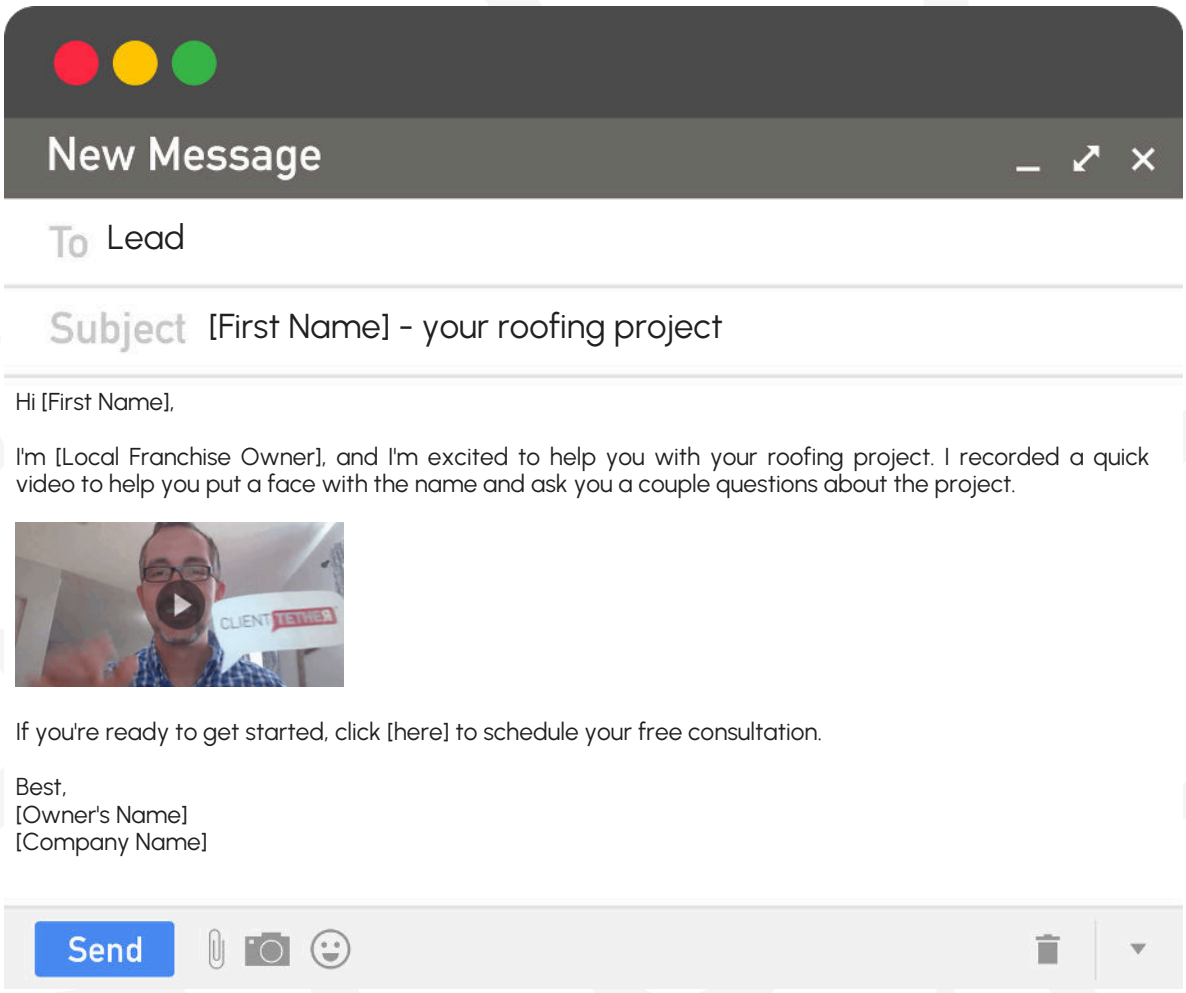
Want to turn leads into customers? We've got you covered. We've put together some practical tips and templates for using ClientTether effectively. From responding quickly to staying in touch, **we'll help you improve how you handle leads and increase your chances of converting them.**

Lead Engagement Plans

Immediate Email with Video Message:

Customers are likely talking to 3-4 competitors, so immediate engagement is crucial. Personalizing your email helps make the recipient feel valued and recognized, boosting engagement from the outset. **Using an engaging subject line increases the likelihood of the email being opened.**

Suggested Email Content:



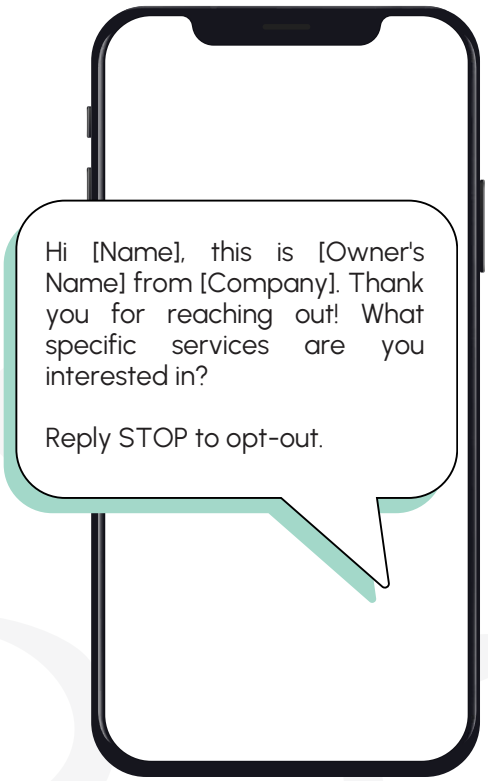
Embedding a short, friendly video builds a personal connection and establishes trust quickly. Lastly, maintaining a professional yet warm tone fosters a positive first impression and sets the stage for a successful relationship.

Putting their first name in the subject line will increase open rates by 19%. And using video in your email will increase CTR by 300%.

Immediate Text (1-2 minutes from lead creation):

90% of texts are read within 3 minutes. Due to spam, people rarely answer unknown calls. Texting before you call can improve engagement with your leads quickly, which can increase call answer rates by as much as 40%. Since most younger generations prefer texting over calls, it also enhances the overall customer experience.

Suggested Text Content:



Sending an immediate text message **within 1-2 minutes of lead creation is essential** for engagement.

Personalize it by addressing the recipient by name and introducing yourself. Thank them for reaching out and **ask about their specific service interests.**

Ensure the opt-out option is clear. Keep the tone friendly yet professional to foster trust and encourage further interaction.

Text each lead **within 1-2 minutes** to optimize conversion rates.

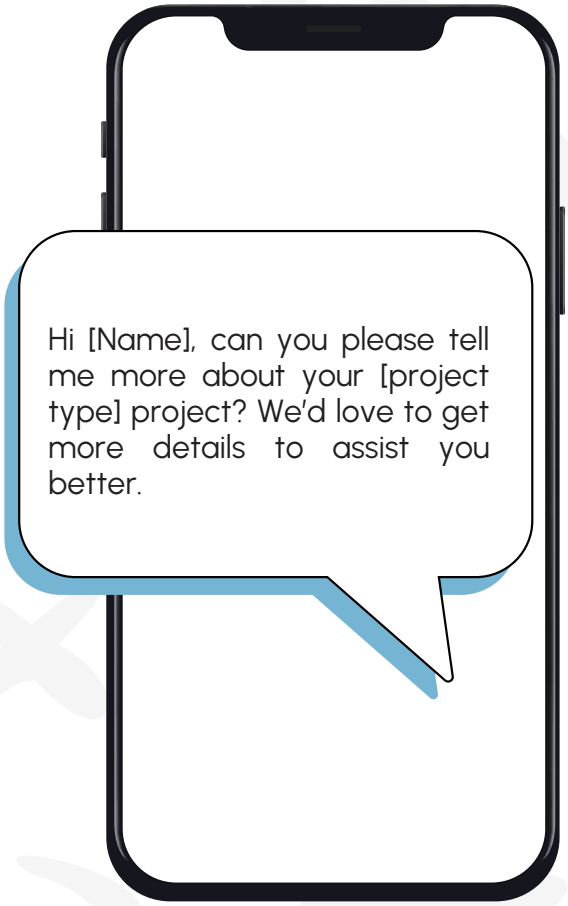
Auto Call (2 minutes after the text):

Suggested Call Content:

Hi [Name], this is [Owner's Name] from [Company]. We just received your inquiry and wanted to follow up quickly. We're here to help you with your [project/service]. Please let us know how we can assist you.

Next Day Text (Lunch Time):

Suggested Text Content:



Sending a next-day text around lunchtime is **a strategic way to re-engage leads.**

Personalize the message by addressing the recipient by name.

Ask about the scope of their project to understand their needs better and **show genuine interest in assisting them.**

Keeping the tone friendly and professional **encourages a positive response** and further interaction.

Winning a deal? 53-78% of the time, **it's about being the first to have a meaningful chat!**

Second Day Call Reminder:

Call Reminder: Remind the CSR team to call the lead.

Remind the CSR team to call the lead on the second day for timely follow-up. Emphasize the importance of addressing questions or concerns. **This proactive approach can significantly improve lead conversion rates.**

Third-Day Email (7:30 am):

Suggested Email Content:

New Message

To Lead

Subject A Special Message for You

Hi [Name],

A lot of our clients were struggling with lead contact rates, marketing ROI, and closing deals before working with us. Here's a short video from Ken Doty that shows how we helped his franchise system solve these problems.

Have you got time to connect in the next week or so?

Best,
[Owner's Name]
[Company Name]

Send

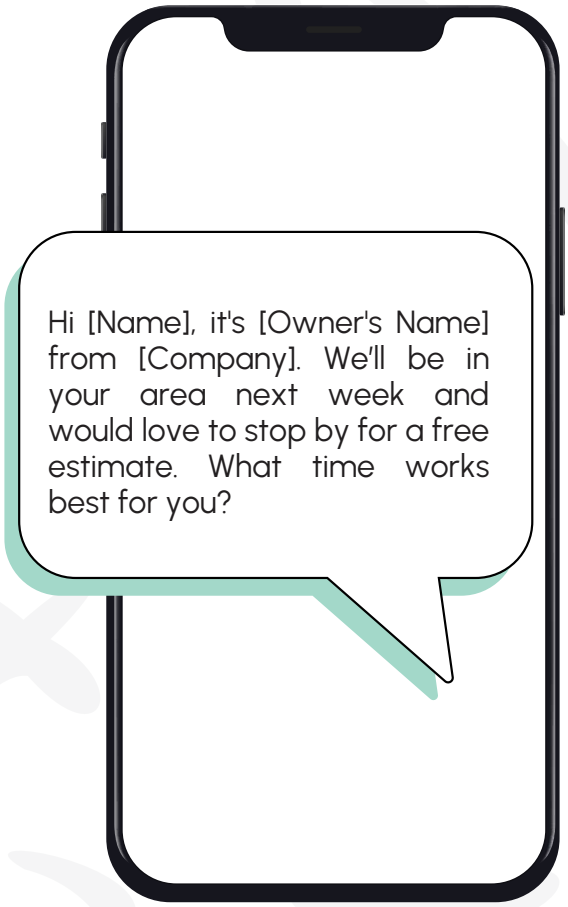
Focus video content **on value adding content** and less on promotion to **boost engagement**.

Sending a third-day email at 7:30 am can effectively capture attention early in the day. Start with an engaging subject line to draw interest. Personalize the email by addressing the recipient by name.

Share a testimonial video to provide social proof and build credibility. Highlight your willingness to address any concerns and include a clear call-to-action link for scheduling a free estimate.

Fifth Day Text (11:45 am):

Suggested Text Content:



This approach leverages ClientTether's best practices for client engagement and follow-up, e**nsuring your message is received at an optimal time and personalized** to increase response rates.

Make sure your message is concise, offers clear value, and **provides an easy path for the client to take the next step.**

By doing so, you can significantly **improve your conversion rates** and customer satisfaction

Seventh Day Call Reminder:

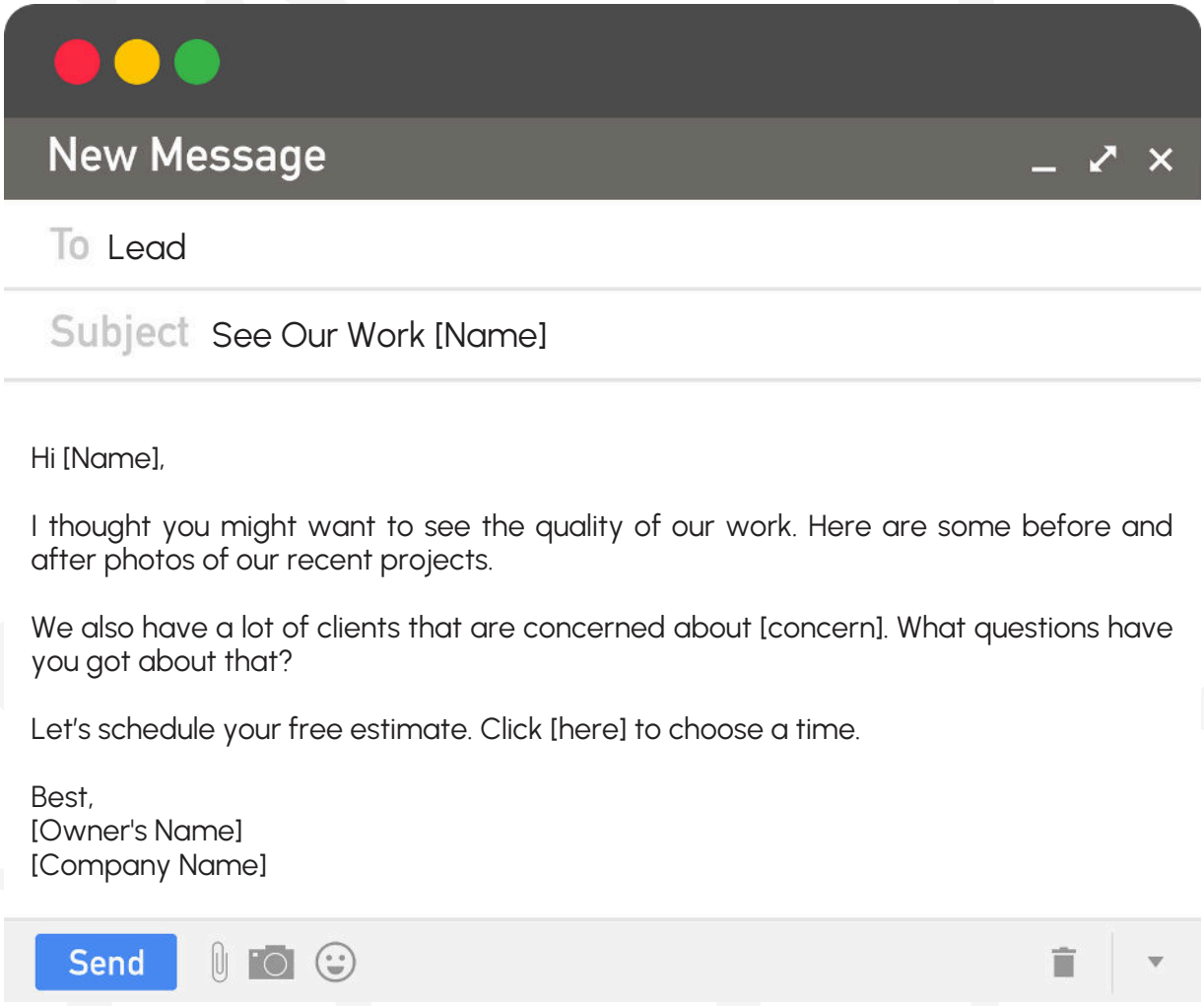
Call Reminder: Remind the CSR team to call the lead.

To ensure your CSR team maintains effective follow-up with potential leads, implement a strategic call reminder system. **On the seventh day after initial contact, remind your team to make a follow-up call to re-engage the lead.** This approach can be crucial in converting leads into clients by demonstrating your commitment and promptness.

Effective nurturing can **increase sales by 50% at 33% less cost.**

Tenth Day Email:

Suggested Email Content:



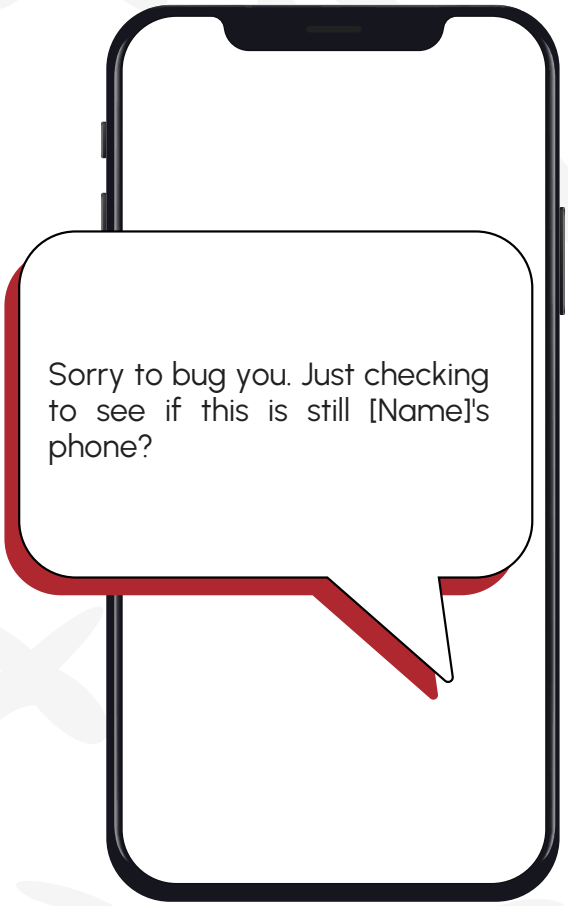
This email leverages visual proof of your work and directly addresses potential client concerns, **making it more likely they will feel confident and motivated to proceed with a free estimate.**

By **including a clear call-to-action**, **you simplify the scheduling process,** increasing the likelihood of conversion.

To **optimize** lead **conversion** rates, your team needs to make **8-10 touches** on each lead.

Fourteenth Day Text:

Suggested Text Content:



This simple and direct message serves two important purposes. It verifies the contact information, ensuring you're reaching the correct person and keeping your database accurate.

Additionally, it **offers an easy opt-out option, which is crucial for compliance with communication regulations** and shows respect for the recipient's preferences.

This approach helps maintain a positive relationship with leads by respecting their privacy and fostering trust, **ultimately enhancing engagement** and improving the likelihood of converting leads into customers.

Nurturing should **include texting, calling and emailing and vary delivery times** across optimal engagement periods of the day.

Eighteenth Day Call Reminder:

Call Reminder: Remind the CSR team to call the lead.

This reminder ensures that no lead falls through the cracks, reinforcing your commitment to excellent customer service. By prompting your team to follow up consistently, i**t highlights your dedication to thorough and attentive client management.** Regular follow-ups show potential clients that you value their business and are proactive in addressing their needs.

Twenty-First Day Text:

Suggested Text Content:

Sending a follow-up text on the twenty-first day helps maintain a courteous and professional relationship with potential clients, even if they haven't engaged further.

This message serves several key purposes. **It leaves the door open for future opportunities**, showing the client that you are still interested in their needs and ready to assist whenever they're ready.

This approach **helps in maintaining a positive impression and potentially re-engaging** the lead in the future.

Move to Long-Term Nurturing Plan:

Automatically update their sales cycle to move the lead out of the active sales pipeline, while continuing lead engagement.

Automatically updating their sales cycle to move the lead out of the active sales pipeline is a strategic way to manage your leads efficiently. **By shifting these leads into a long-term nurturing plan, you ensure they continue to receive relevant information and updates about your services without overwhelming them.** This helps keep your brand in their minds.

Omnichannel nurturing **ensures optimal contact rates** across varying demographics.

CLIENT TETHER™

The Franchise CRM

Ready for Better Results?

Get Started Now!

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