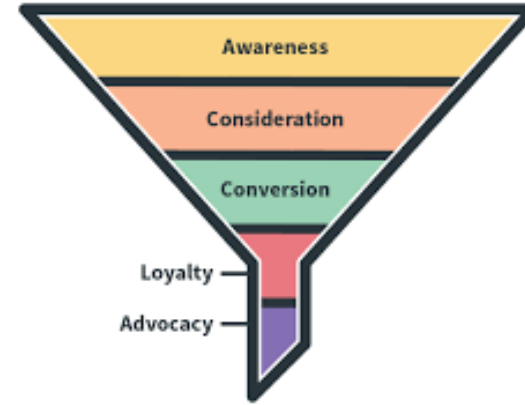# Forms – The biggest mistake for an enquiry led business

Why do I hate Forms?

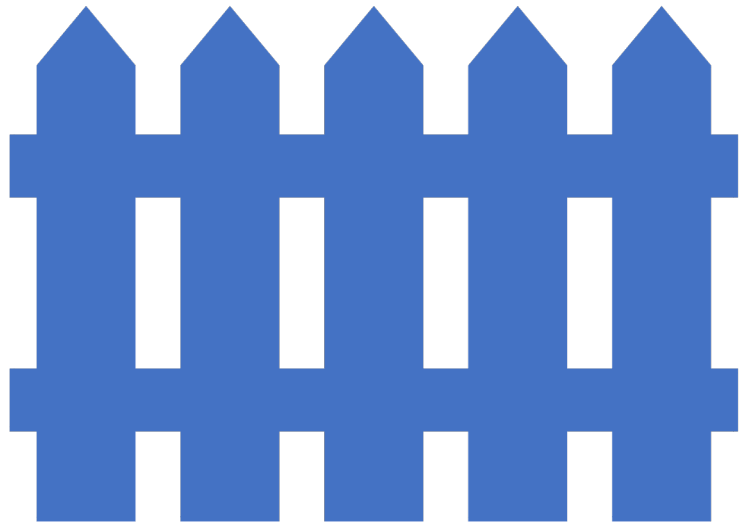# Here are a few reasons why

Sales Revenue – lack of it

I meet so many CEO's or Business Leaders
That are <u>not happy</u> with their revenue.

Let alone a "start up" whose survival
depends on the product to revenue "fit."

Then you walk down their purchase path
and find forms everywhere.

Poor customer journeys with barriers or
Friction in them – and you feel for them.

Barrier
every psychologist will tell you the relationship between the number of fields in a form and the % of filled in forms

Lazy or ....

Naive, Time starved, action rather than results driven or just plain ......daft.
What is the reason?

Here is why we prefer smart fields rather than forms

"The frictionless conversion path"

Turn Left for a form "barrier filled" journey

Turn Right for "downhill frictionless journey"

Which path would you take?

They both get you to the same place – One in large numbers – the other for Masochists only!

Lowering your cost to acquire a new customer

Desirable?

Simple concept :

Large numbers of suspects entering the funnel, being educated as they progress, on how to fix their issues, will follow the funnel and convert to customers and at a high rate.

Why?

Because you can tailor their journey, feeding them information that deals with their very particular issue.

Only though
- if you take time to think things through and you take the time to know your business and prospects / customers well.

Golf Example / Case Study – Context first

Smart Field HubSpot - What Is it & How To Create It?

19 Feb 2019 — As the name suggests, **Smart field HubSpot** is a method that helps you capture data smartly, where you can collect relevant and new information ...

HubSpot

HubSpot Progressive Profiling and Smart Form Fields 2019.

- 4 years a go HubSpot introduced a smart field data gathering tool – that in English, collected a "single field" at a time.

- The base principle was easy
  - Design a "suspect to customer journey"
  - Give the Suspect something of value for every data field they give you – a simple trade.
  - They will give you data, valuable data that helps you tailor their journey into a frictionless one.

2 Reasons not to use a form

1. Do not use a form because it introduces FRICTION into the customer journey.
2. Do not use a form when you can use an intelligent customer journey, that delivers a fuller, better informed profile.

How to design that frictionless customer journey - options are …..

Lazy or …….

INTELLIGENT THINKING
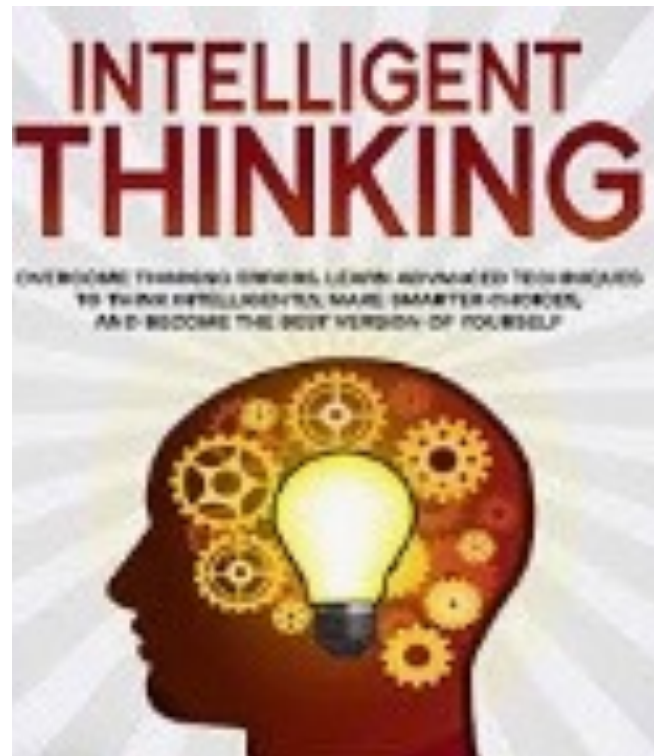
First some questions – to get you on the right path

Does every golfer need a lesson? Answer – yes

Traditional Solution ; Book a lesson!

Does the golfer with a hook need the same lesson as someone with a slice?

Answer ; NO

Then Tailor two different journeys to get more lessons revenue.

Does someone buying a car parking space booking solution, need the same customer journey as that person who is wanting to fix desk booking?

Answer : NO

Then Tailor two different paths dealing with the very different issues, customer types and symptoms of the issues, they both have.

Before you go blaming your marketeer ; read the next slide with a self-critical lens.

The Symptom of an enquiry issue / revenue issue

(A form in the customer journey)

(there could be 10 others – see slide 13)

To often its not effort, its time, money, understanding, resources or worse the habit of doing without thinking, because fast action is valued above a small delay and great results.

Or The marketeer was never allowed HubSpot and the version with smart fields.

Or They weren't given the time to think through the journey

Or They had a boss that thought they knew Marketing but "hadn't got a Scooby do"

Or even more likely, they were under resourced and hadn't the time to learn about smart fields.
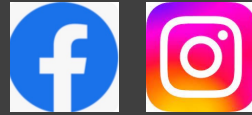
Or …. The good reason list is endless

However, the Business is still not as in as good health, as it would be with 10's, 100's of more new clients

Golfing Customer Journey A v B

Journey A

Start of journey : Need a lesson?

- Either Menu Item on website
- Or a Landing Page with a booking link

End of journey: Book a Lesson click here

(£60 an hour)

- not £15 a month for 3 lessons a year

Booking Form (fields)

- Name
- Email
- Date
- Time

- Firstly, let's look at commercials
- A professional can manage 6-8 lessons a day
- 5 days a week (they need to play golf)
- 48 weeks a year (they have a family)
- Total income opportunity
- = £60 x 7 lessons a day X 5 days a week x 50 weeks a year = £105,000 a year.
- Likely Utilization 50-60% earnings £52,500 - £63,000 p.a.\

Symptom of enquiry or revenue starved business – likely issues to tackle:

1. The Google ranking for 94 teaching keywords is 97 (10th page)- no search traffic
2. No Google Analytics account
3. No SERanking understanding of website audit or target keywords
4. Doesn't measure traffic to booking form and conversion rates
5. Reality : Low Form conversion rates
6. Minimal fields captured
7. No specific issue understanding because they are not posing the right questions
8. Revenue more like £45,000 a year than £52,000 – £105,000
9. One Teaching Pro (not happy with earnings)
10. Perception at the club – Pro helps, but does not go out of his way
11. No easy opt – in journey from Facebook who already know your profile

Golfing Journey B
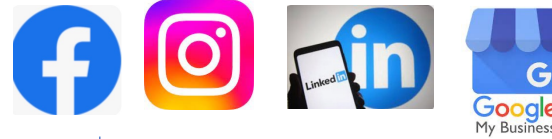
HubSpot Conversion data

Landing Page 1 – Which ones your bad short? Card Wrecker?
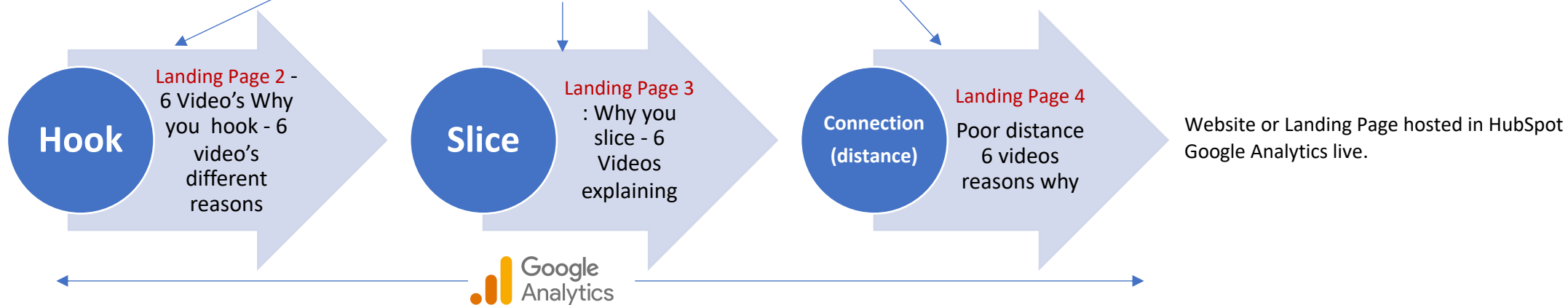(3 Doorways Hook, Slice, Distance)

HubSpot

We launch the Teaser video and Landing page from HubSpot, immediately I have –

Suspect Pool A – existing contact

Suspect Pool B – New Contact

Hook

Landing Page 2 - 6 Video's Why you hook - 6 video's different reasons

Slice

Landing Page 3 : Why you slice - 6 Videos explaining

Connection (distance)

Landing Page 4 Poor distance 6 videos reasons why

Website or Landing Page hosted in HubSpot Google Analytics live.

Google Analytics

1. If I know them, what do I want to know?
Answer: Slice, Hook or Distance (gain 1 field)
As soon as they click on 1 of the 3, I know they're bad shot issue and Send
- Hook, Pro n Trackman free 15-minute diagnostic session offer
- Slice Pro n Trackman free 15-minute diagnostic session offer
- Distance Pro n Trackman free 15-minute diagnostic session offer
From the Opens, Clicks we now have 12 lists
List 1,2,3 – Hook / Slice or Distance – not urgent – "didn't open email"
List 4,5,6 – Hook, Slice, Distance – curious – intermediate term – "clicked on email" – remarket
List 7,8,9 – Distance – need now – hook , slick, distance – "opened email" send this week's "dates n times offers"
List 10,11,12 Booked a Diagnostic session Hook, Slice, Distance clinic

2. If I don't know them, I post to Social a "15-minute Free diagnostic session with Pro & Trackman" Offer
Gain : Enrolment requirement, 1. smart field "email address" 2. Smart field: select issue, "hook, slick, distance".

We now know from the Google analytics

Which problem they had? That was goal 1
How many converted to the Diagnostic offer? That was Goal 2
We know the conversion % x £60 (potentially)
We know the non conversion interested value x £60 (potentially)

We know now 12 lists, 9 of which that need a lesson

3 lists are Urgent they booked (do we need to add a Pro)
3 Lists are "Next diagnostic" session targets (open read email)
3 are the "diagnostic session after that" (clicked email)

awareness

Suspect

Educate

Consider

Qualify through education

And through diagnosis

Convert

In a trust filled frictionless manner

Problem

1. Slice

Education

Slice Landing Page
Entry Options

Grip Size Video
Grip Size Blog
Poor Grip
Shaft weak
Stance open
Swing open

Call To Action

CTA Book A 15 minute
Free Diagnostic
Session

Booking
- First name
- Surname
- Email

Diagnosis Data

Grip Size

Poor Grip

Shaft weak

Stance open

Swing open

Grip Selection Set in Diagnostics Bay
Order there and then

Conversion closers
Price Match
Free Fitting

Book a lesson there and then

Swing Data – Trackman
Recommended Shaft Type
Speed n Shaft type - Chart in the bay

Book a lesson there and then

Book a lesson there and then

Lesson calendar in outlook
Pro's diary synched with HubSpot

Entrance Data
Performance by page

Entrances
Per problem
category

Entrances
To the diagnostic session
True Insight into your base numbers

Customer
Journey
data

Lead Scoring
The more areas
they look at the
better the
quality of
suspect
1,2,3,4,5,6

The Higher the Score
Indicates level of
suspect seriousness at
fixing their issue

Diagnosis session
Results Entered in
HubSpot on tablet or
Mobile to expand the
customer profile
(insight)

Order / Book Results
Entered in HubSpot
Now you have
conversion to deal
data & values

Payment data
collected from stripe
gives you customer
values and a
frictionless payment
process

15

Form Journey A

v

Smart Fields Educational Journey B

Form

- Revenue £45,000

- Pro not over busy

- Club members not overly convinced the Pro really cares

- Very little data

- 11 potential issues

- I might get a few new lessons booked every week

- Likely **new revenue £240**

(4 new client lessons extra a week – tops)

30% of my 2,000 followers went to to What's your card wrecker shot? – Page

Of the 600 who went to the page, 200 identified themselves as:

- Hook , Slice, Distance (200 extra lesson suspects)

- 70 didn't open the free Hook diagnostic session

- 85 clicked on it (85 x £60 Still Suspects)

- 45 booked a diagnostic session

(45 x (% conversion rate to lesson) x £60)

Of the 45 who took the diagnostic

- 18 booked a £60 lesson (£1,080) measure repeat business

- 7 booked a re-gripping of their clubs (£637)

- 2 booked a fitting (£2400) – they had the wrong shafts

- 2 took the £20 a month – 4 lesson subscription (£480)

- 2 took the £40 a month – 8 lesson subscription (£960)

- 4 did not book an went on to do mobility exercises to turn better

 Revenue impact

Lessons £1080

Re-grips £637

Fitting £2400

4 subscriptions £1440

Total £5,557

Revenue Impact Smart Field Journey 23 : 1 Form £5,557 v £240 (in a week)

Learns

Gain 2- 600 folk entered the suspect funnel from Social Media when offered the What's your card wrecker? Landing Page Guide & Videos.

Gain 3- 600 extra fields where we know their current issue (added to HubSpot profile)
- Hook
- Slice
- Distance
We can now remarket to this audience knowing specifically their issue
- With tailored advice – low friction – automated email
- With tailored offers – low friction – automated email
(as soon as the hook, slice , distance field is populated, the automated email is triggered)

Gain 4- List 7,8,9 opened the self diagnosis videos but didn't book
- Hook
- Slice
- Distance
We know they're our top of pipe prospects for a lesson
- We can target them with offers, added value, to fill the forward order book
- Again, targeted diagnostic lessons on each "issue area"

Learns

Gain 5 List 4,5,6 clicked on self diagnosis videos on either:
- Hook
- Slice
- Distance

We can now send them very specific tempter emails x 6 on how to
- cure a hook
- cure a slice
- fix a distance issue
Knowing we gain intelligence on which of the 6 video's they watch

We can lead score their likely migration to a diagnostic lesson – How?
- by how many video's they watch
- which video they watch most

Learns

HubSpot

Gain 6 Conversion data

We now know the proportion of
"followers" to Goal 1 Hook, Slice, Distance

What's your card wrecking shot?
6 slice reasons
6 hook reasons
6 Distance loss reasons

Google Analytics → Goal data

Gain 7 Conversion data

We know the proportion of
Visitors to "What's your card wrecking shot"
That convert to diagnostic lessons

Gain 8 Conversion data

We know the proportion of
Prospects that attend diagnostics sessions
That convert to full lessons

Gain 9 Conversion data

We know the proportion of
Visitors to "What's your card wrecking shot"
That convert to full lessons

How many symptoms of a sick sales line or marketing function not firing on all cylinders have we addressed fully or partially?

Symptom of issues:

1. Google ranking for 94 teaching keywords 97 (10th page)- no search traffic

(We have started with indexed landing pages and gained insight to understand the balance of "education piece we can write with data to support it on hook, slice and distance issues)

2. No Google Analytics account

We have basic conversion data on 3 goals, issue ID hook,slice,distance. Conversion to Diagnosis session, Conversion to lesson from diagnostic session)

3. No SERanking understanding of website audit or keywords

We have keyword data on issues, we have opened our SERanking accout to learn about landing page rankings

4. Doesn't measure traffic to booking form and conversion rates

Box ticked

How many symptoms of a sick sales line or marketing function not firing on all cylinders have we addressed fully or partially?

Symptom of issues:

5. Reality : Low Form conversion rates

23 x Revenue conversion

6. Minimal fields captured

More Fields captured, specifically on email and issue

7. No specific <u>issue</u> understanding

Definite understanding of the macro issues

8. Revenue more like £45,000

Loaded £5,557 more revenue and created a pipeline for more from the many suspect and prospect lists, we have a pipeline

9. One Teaching Pro (not happy with earnings)

Far happier he can see a growing Forward Order Book and a pipeline for lessons

10. Perception at the club – Helps, but does not go out of his way

Perception at the club has moved dramatically as they see a helpful process to fix their golfing issues in a frictionless manner

Summary

1. We moved from a form to smart fields and the weekly new revenue climbed 23X

2. We gained a ton of conversion data – that now acts as a base figure to improve on

3. We gained a set of lists of prospects to market to "with specific issue addressing content"

4. We improved the club's perception of the Pro as they see "the value added" by the diagnostic sessions

5. We gained a pipeline

6. We improved the customer journey

7. We sent relevant material that educated the client to move to the next stage

How?
1. We spent some time developing an "educational, low friction, customer journey"
2. We used "how they moved down that journey" to "add fields" into HubSpot.
3. Those fields gave us far greater insight into the "suspects specific issues"
4. Fields that enabled issue specific / tailored messaging pertinent to them