

# Climate Tech Go-to-Market

Your zero hype guide



Resin8

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# How to drive value with variables

In business, variables are the game, if you want to stay sane.

Focusing on the areas with the most value-adding potential is how you will be able to adjust the performance needle of your business.

When you assess the cumulative impact of the relevant variables in your business, you will start to get a clearer understanding of your business' potential.

Take time savings:

Longer implementation timelines, with increased workload for your clients, hence increased time investment for all, is a lower satisfaction outcome and increases friction for your team, especially during times of high volume client acquisition.

By focusing on reducing the implementation time, through technology investment or process improvements you can increase value for your business, your clients, and that can then lead to other advantages such as increased word-of-mouth referrals from satisfied clients.

Whereas, if you have already reduced the implementation time for your solution to be as reasonably efficient as possible, further iteration can lead to a deterioration in quality. If that is the case, then there is a limitation there that either means you have reached the potential in that area for the time being, or the investment to improve it would not provide a reasonable ROI.

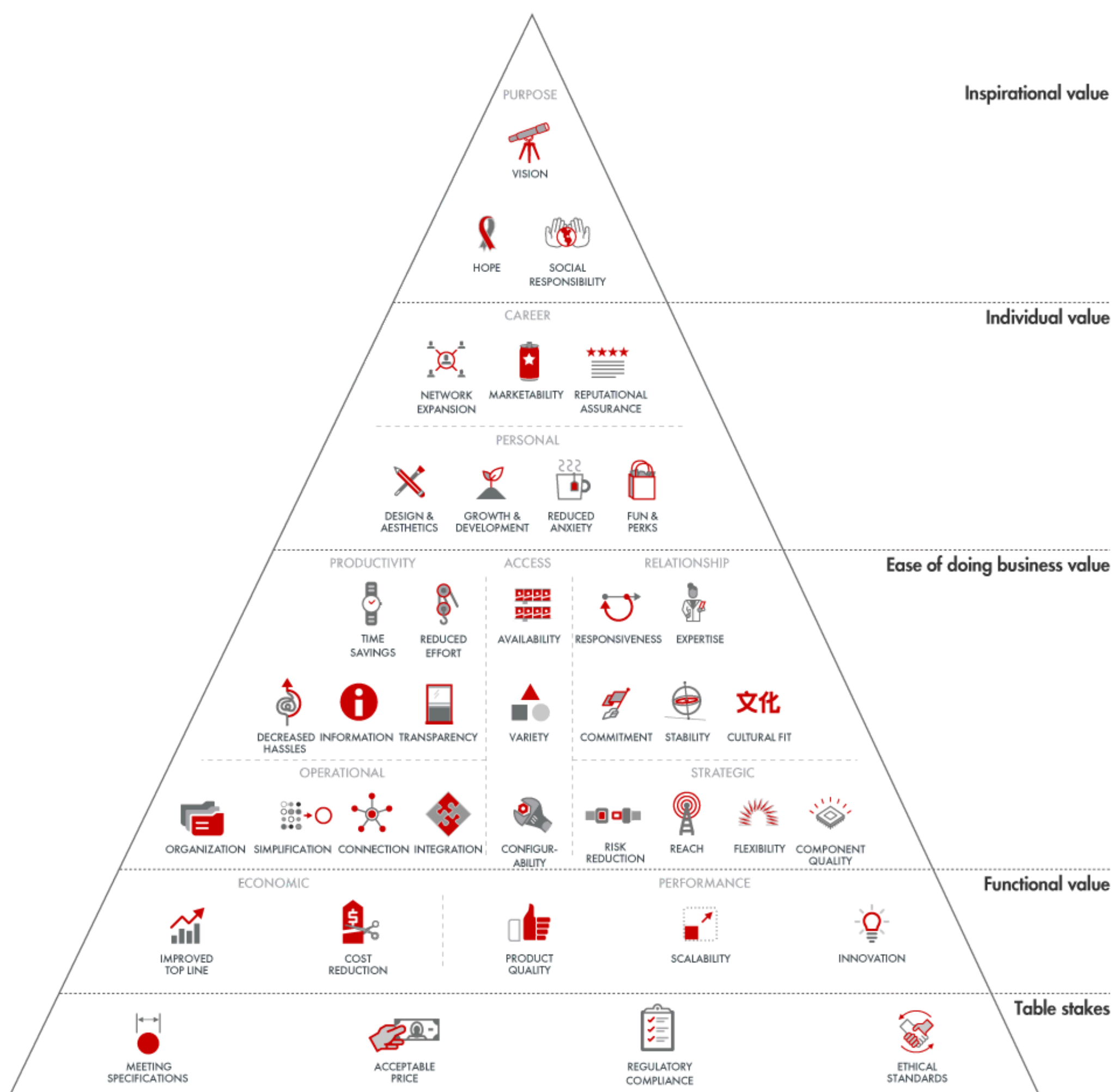
By becoming more nuanced in how you analyse your business performance, you can better identify and appreciate all the small adjustments that are made to improve performance...

Rather than looking for the secret that doesn't exist.

Like most things in life, it is the accumulation of small wins that will amount to the long-term viability of your business.

It is rarely going to be that one big thing that radically redirects your trajectory.

The following B2B value creation pyramid is an excellent reference for identifying areas of value, i.e. the variables you can look to adjust to generate value for your client and your business.



Source: Bain Consulting

# **Keep your clients so they don't move to your competitors**

In the early days, retaining clients is not always the first port of call, it's not the exciting or well known part of marketing that is considered an imperative.

But keeping clients is more cost effective than acquisition and provides long-term opportunities for revenue generation and word-of-mouth referrals.

You want to mitigate churn, though losing clients is normal, so don't be shocked.

A proactive approach to client retention will help you identify early warning signs that a client may be a churn risk so you can engage with them to mitigate the risk of them leaving.

## **Don't put all your eggs in one basket**

The other side of the coin with retention is that you may find yourself so focused on your one large client, to the detriment of the rest.

Allocating a disproportionate amount of resources to one client takes focus away from developing relationships across your portfolio, generating pipeline, and may lead to inconsistent service levels for other clients.

Beyond the generic satisfaction issues, a single large client can exert significant influence over your product roadmap, leaving you feeling pressured to prioritise their desires, over other more value-creation focused roadmap decisions that adequately consider the demand across your addressable market.

## **Churn Indicators**

Negative feedback or raising complaints is the obvious indicator, don't let it be the only one.

Consider these indicators and how you can track them through your teams engagement or using technology:

- Declining usage and reduced session frequency
- Low levels of feature adoption during their onboarding period
- Increase in the number or severity of support tickets
- Downgrades from higher-tier to lower-tier plans or features

## **Mitigating churn**

- Schedule regular check-ins with clients to understand how they are travelling
- Tailor communication and support based on client type and value
- Address issues identified through feedback or usage patterns before they escalate
- Implement client success tasks or programs to ensure they are maximising their ROI
- Enhance your onboarding process to ensure early adoption and fill training gaps

## **The exit interview or survey**

When the inevitable happens, have a process to collect feedback by undertaking an exit interview or survey.

This is the best time to get real truthful feedback, while it is still fresh in their minds and the relationship still exists. Getting legitimate feedback from clients beyond generalities is usually difficult, when a client churns it is low risk for both of you to have an honest discussion that can lead to real improvements in your product or process.

Try to understand their reasons for churning without making it about you. There are often things outside of their control that will drive their decision or requirement, and by understanding the other stakeholders involved you can better equip yourself for ongoing retention activities. This is also an opportunity to identify insights your sales team can use to engage with the reporting line stakeholders they do not talk to directly but sign-off on budget requirements.

## **Client Exit Interview Questions**

### Reason for Leaving:

- Can you describe the main reasons for deciding to end our service?
- Were there specific issues or challenges that led to your decision?
- What solution or service are you transitioning to?
- What were the main factors in choosing this alternative?

### Product:

- How would you rate the overall performance of our product? (Scale of 1-10)
- Were there any specific features that you found particularly useful?
- Were there any usability issues or challenges?
- Did you feel that the product provided good value for the price?
- Were there any features that did not meet your expectations?

### Client Support:

- How would you rate the support you received from our team? (Scale of 1-10)
- Were there any particular support interactions that stood out, either positively or negatively?
- Was the training and documentation adequate for your needs?
- Were there any gaps in communication or areas for improvement?

### Suggestions for Improvement:

- What specific improvements would you suggest for our product or service?
- Are there any features or changes you think would have made you stay?
- Are there any additional services or features that could have influenced your decision to stay with us?

### Additional Comments:

- Do you have any other feedback or comments you'd like to share?



# **Your client journey matters, so make it matter**

Mapping your client journey is your pathway to a truly client centric operating model.

This does not mean the client is always right, cliches be damned... but your business does of course need to be setup to deliver on their needs, ensuring client satisfaction backed by business efficiency, rather than business efficiency driving your client experience.

Ensure that it enhances their experience rather than complicating it.

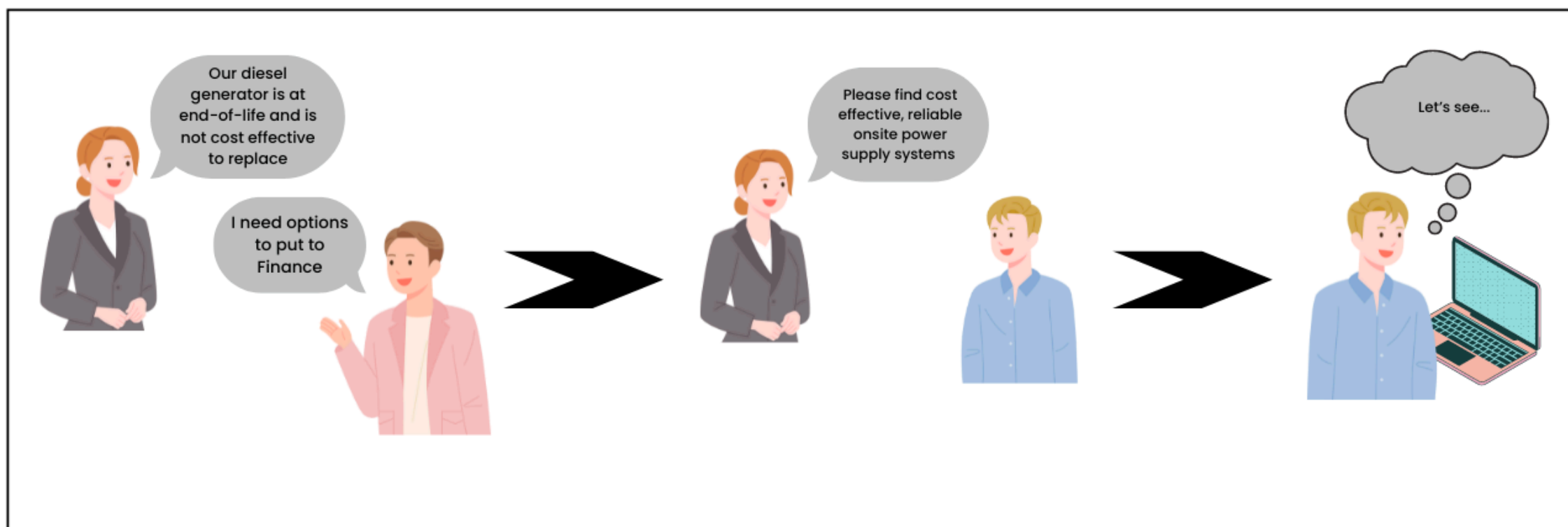
When internal processes drive the client experience, you can quickly end up with convoluted hoops they have to jump through during contracting and other pivotal stages, that can affect your teams ability to satisfy them no matter how hard they work to.

Getting the basic steps down piece by piece helps, because once you have the beginnings of the journey, you can build on it, and clarify it, and use it to educate new team members who can then provide feedback and forward you go... before you know it you have a super useful map of how you interact with your clients.

Through the sales cycle, implementation, and along their lifecycle with your solution.

Start simple, keep building it out simply... and when you have it built out then you can get into the complexities.

The following is an example of how a corporate buyer may end up looking for your solution. On first look it might seem strangely simple. That is the point, this is enough to inform a marketing campaign, and enough for new employees to start to pressure test their thinking when engaging with prospects, and even a good reminder for yourself to make sure you are not overcomplicating things.



When you have the rough beginnings on a page, it is easier to expand into the end-to-end journey stages, along with the activities involved at each stage. This moves into considering how your prospects and clients interact with you, so you have a pathway to analyse how effective each stage is against its importance.

Search and buy	Use	Pay	Get help or information	Change or manage	Cancel
Buy a new wireline product or service	Communicate with others through voice, text, video	Control usage, ensure a bill is correct and pay	Report a technical issue/have a wireline product or service fixed	Change my customer account information or settings	Cancel my contract
Buy a new mobile product or service	Watch video, streamed or downloaded	Get information about a dunning notice/provide proof of payment	Report a technical issue with a mobile product or service	Activate/block/unblock my SIM	
Get information about an order or activation	Create content		Get nontechnical information about products, services or my account	Move my fixed services to a new location	
Change or cancel my order	Share content		Get an update on the status of a previous service request/ensure it is processed correctly		
Add or cancel an option					

Source: Bain Consulting

# Delivering on your client journey, generate word-of-mouth

So, you have your client journey mapped out, no matter how simple to start with, you have it. How do you keep the operational chaos manageable and avoid letting client relationships slip?

For example, your sales team may be getting contracts across the line, but once projects move to operations all hell breaks loose.

By supporting your operational teams with a defined service delivery process, you can better align sales to operations with a mutually understood process they can both feed into.

For obvious reasons, tech startups often have strong personalities in sales to drive the business forwards, and an open ear from the MD / CEO can give them power to influence what operations delivers on.

Unto itself that may be a ubiquitous reality.

Left to fend for themselves, operational team members can become blockers to effective delivery. Not because they want to, but because there is a limited number of people that are also attempting to create process on-the-fly, combined with imbalances in role responsibilities as the business ebbs and flows.

Your service delivery process will help to balance out these competing priorities, while empowering team members to point out where they are struggling so your management team has practical problems to solve.

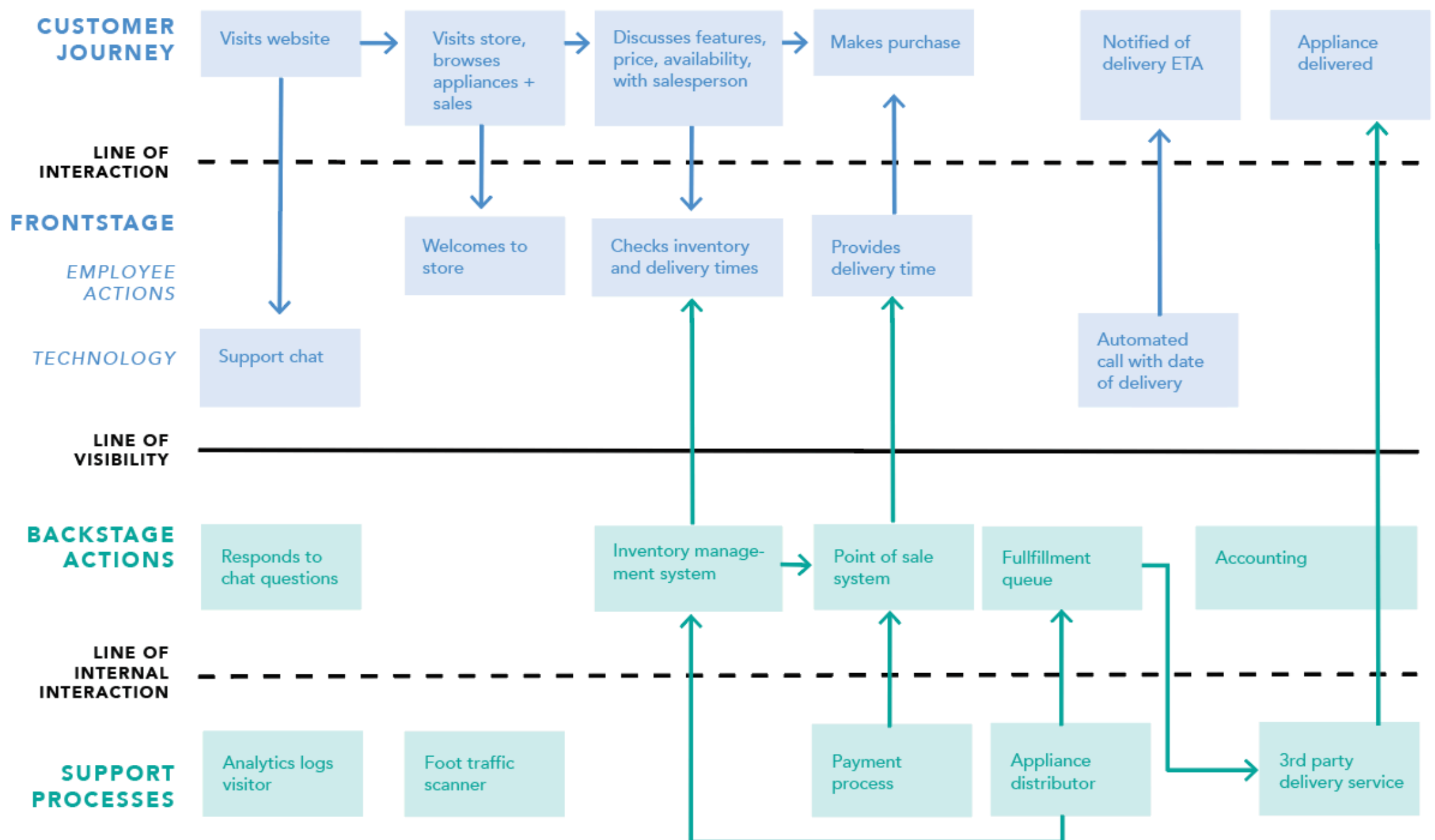
Super important for startups to keep cohesion and not fry the heck out of dedicated team members.

So clearly document the actions required at each stage - some important considerations for your service delivery process include but are not limited to:

- Align with Roles and responsibilities of your team members. This helps in practical implementation and avoids confusion. Include step-by-step instructions, responsibilities, and timelines.
- Schedule a kickoff meeting with the client and both sales and operations teams to align on project goals, timelines, and responsibilities. Use this meeting to clarify expectations and address any questions.
- Develop a standardized handover process that ensures all necessary information is transferred from sales to operations.
- Conduct risk assessments to identify potential operational challenges before they arise. Develop preliminary contingency plans to address these risks such as what team members will provide overflow support and the approval process if this needs to occur.

As with your client journey, starting to get your service delivery process on a page will help motivate you to keep iterating, through to having a true model of your operations.

The most cohesive way to align your client journey with service delivery is to take your high level journey map as shown above and add the supporting delivery aspects.



Source: NN Group

# Using the client journey for client insights

A good way to start building value into your client journey work is to cover the pre-sales process, the section of the journey that your revenue focused team members will need to ensure they are making the maximum impact with sales opportunities.

As well as ensuring any revenue work you outsource is approached based on your clients and their requirements, rather than being left to wholly generic industry speak.

When you are ready you can then expand this across your client lifecycle, so you have insights that support client satisfaction, retention, upsell opportunities, and the like.

PRE SALES JOURNEY - CLIENT INSIGHTS					
What level manager signs off?	What other client roles in the sales process?	Will they need to make an internal presentation?	What insecurities do they have about taking action?	How we interact with them?	What roadblocks do they come across internally?
<b>Consideration</b>		<b>Prospect</b>		<b>Decision</b>	
<ul style="list-style-type: none"> <li>• What info they require at this stage? (to move to next stage)</li> <li>• What is their goal at this stage?</li> <li>• What stops them moving forward from there?</li> <li>• What is an average timeline for this stage?</li> <li>• What other options will they be considering?</li> <li>• What are their expectations / pre-conceived notions about the product?</li> <li>• What keywords might they be searching for?</li> <li>• What solutions are they looking for?</li> </ul>		<ul style="list-style-type: none"> <li>• What info they require at this stage? (to move to next stage)</li> <li>• What is their goal at this stage?</li> <li>• What stops them moving forward from here?</li> <li>• What is an average timeline for this stage?</li> <li>• What are their drivers?</li> <li>• What hesitations at prospect stage?</li> </ul>		<ul style="list-style-type: none"> <li>• What info they require at this stage? (to move to next stage)</li> <li>• What is their goal at this stage?</li> <li>• What stops them moving forward from here?</li> <li>• What is an average timeline for this stage?</li> <li>• What are the main decision points prospects mention?</li> <li>• What is the average decision criteria?</li> <li>• Obstacles to purchasing?</li> <li>• What hesitations they have at the decision stage?</li> </ul>	

# What can go wrong without a clear client journey

Having clear client journey and service delivery maps helps to mitigate two core issues:

## **Inconsistent Service**

If clients experience differing approaches from team members each time they purchase or interact with your business, this can lead to confusion and dissatisfaction due to ingrained expectations. Frustrated clients are more likely to look to your competitors.

## **Wasted Resources**

As your business grows, managing a growing number of clients without a clear journey becomes increasingly complex, leading to inefficiencies that result in wasted time and effort. This can be compounded when your team also have to deal with associated client frustration.

# Processes that don't suck the life out of your business

Sustainable processes that don't suck the life out of your teams' ability to enjoy what they are experts at... is what you are targeting.

Processes that don't get in the way of your team engagement, but support their engagement with clarity and removing unneeded friction.

Processes can get as complicated as you want, but if you start by trying to reinvent the wheel they will cause pain and will not work.

Stage one is getting down your existing approach, simply and clearly. You can iterate and improve from there, from a point of reality.

Humans are not robots, your business processes do not need to be mapped out like software, they need to be functional and easily adjustable for your teams and for inter-departmental collaboration.

They also need to be easy to understand for new team members, and for business continuity should an employee leave before you are able to replace them.

At the very least, you can map out processes with tasks and decision points. So if you can put boxes and diamonds on a page, you can map out processes.

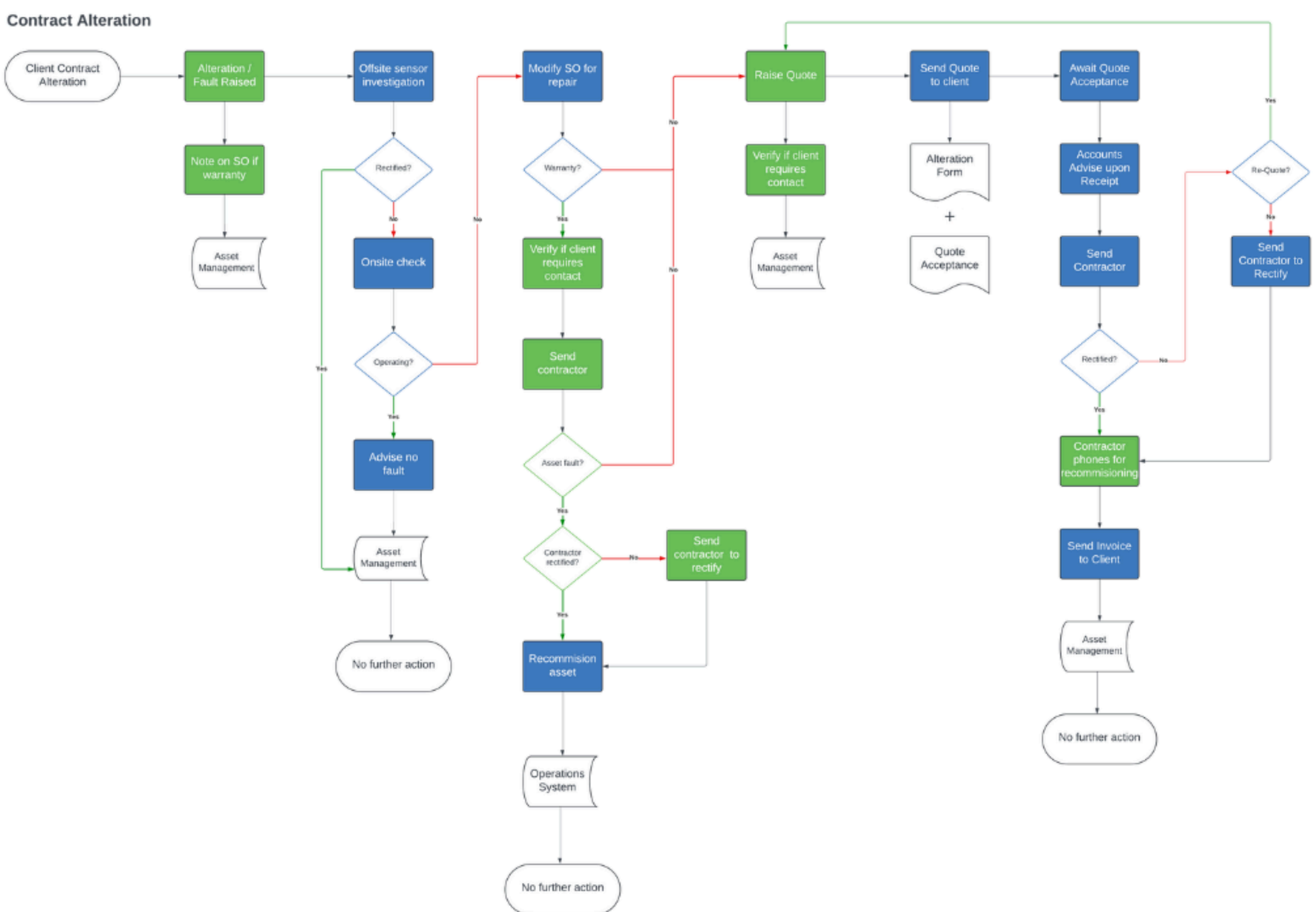


Swin-lanes that split processes into departmental rows or columns are a common approach, though can be hard to follow for those that are not familiar with your business. Swin-lanes can become necessary if your processes become complex enough to need them.

Until then, keep it simple.

In the example below, colours are used rather than swin-lanes to keep it straightforward and easy to follow.

The clearer your processes are for all, the easier and more effective process improvements can be, from management meetings, to interdepartmental collaboration efforts, down to communicating processes to employees.



Processes are your business. Beyond business continuity, if you plan on selling your business at some point, you will need clear and useable processes to show you have a business to sell, that your business is more than you and your team.

Implementing processes that balance structure and flexibility while keeping your team engaged are also essential for scalability.

### **The human side of process improvement**

- Design processes that align with the day-to-day realities of your operations. Consider workflow, resource availability, and potential bottlenecks.
- Recognize individuals or groups who have significant influence or competing agendas. By understanding their motivations you can mitigate inaccurate influences in process development.
- Encourage cross-functional teams to collaborate on process design. This fosters buy-in, minimises friction between teams, and makes them more likely to embrace the changes.
- Implement Checks and Balances with agreement on how to safely raise concerns about bottlenecks in their own or other teams workloads, that are affecting their ability to deliver
- Clearly communicate the reasons behind implementing new processes. Emphasize how they will benefit the team and the organization.

# Bias awareness for better business decisions

Being aware of the biases that occur in decision making help to provide a pathway to strategic optimism, the healthy middle ground that strikes a balance between confidence and caution.

While there are over 50 psychological biases that affect our thinking in different contexts, here are a handful to consider when you are making complex business decisions... without making every decision a project unto itself.

The Biases	Avoiding Their Affect
<p><b>Confirmation Bias</b> People tend to favor information that confirms their existing beliefs or hypotheses, while ignoring or undervaluing contradictory evidence.</p>	<ul style="list-style-type: none"> <li>• Seek out information that contradicts your current beliefs or hypotheses.</li> <li>• Actively challenge your assumptions and interpretations of data.</li> <li>• Encourage diverse perspectives and opinions from others.</li> </ul>
<p><b>Preference-based Habits</b> Making decisions based on what has been done in the past or what feels familiar and comfortable rather than exploring new options.</p>	<ul style="list-style-type: none"> <li>• Actively seek out new options for consideration.</li> <li>• Evaluate and challenge habitual choices.</li> <li>• Implement decision-making processes that encourage deliberate consideration of alternatives.</li> </ul>
<p><b>Vividness</b> Giving greater importance to vivid, memorable, or emotionally charged information over other factors that may be more relevant.</p>	<ul style="list-style-type: none"> <li>• Endeavor for quantitative data and evidence in decision-making processes.</li> <li>• Look beyond anecdotal or emotionally compelling information.</li> <li>• Use scenarios or simulations to illustrate potential outcomes based on data.</li> </ul>

<p><b>Halo Effects</b>          Allowing a single positive or negative trait of a person, object, or situation to influence overall judgments about that entity.</p>	<ul style="list-style-type: none"> <li>• Separate judgments when evaluating different attributes of a decision or individual.</li> <li>• Encourage detailed analysis of each component separately before integrating into a holistic decision.</li> <li>• Identify irrelevant attributes that are incorrectly influencing the decision.</li> </ul>
<p><b>Context Effects</b>          Decisions are influenced by the surrounding context or environment, rather than being made in isolation or based solely on the merits of the decision itself.</p>	<ul style="list-style-type: none"> <li>• Consider decisions in different contexts to understand how context influences choices.</li> <li>• Perform scenario planning to anticipate different contexts.</li> <li>• Consider broader systemic effects beyond immediate contexts.</li> </ul>
<p><b>Inability to Combine Cues</b>          Difficulty in accurately integrating multiple pieces of information when making decisions, resulting in oversimplification or reliance on limited data.</p>	<ul style="list-style-type: none"> <li>• Use decision-making tools or algorithms that are designed to integrate multiple sources of information.</li> <li>• Foster interdisciplinary collaboration to leverage diverse expertise and perspectives.</li> </ul>

**Don't trust your gut: Finding the sweet spot between intuition and analysis**

Intuition can be valuable for quick decisions, leveraging experience, and identifying opportunities that data might not reveal immediately. Gut instincts are more easily influenced by biases and may lack the rigor needed for complex decisions.

Over-analysis can slow down movement, making analysis and data more suitable for complex decisions, mitigating the weaknesses of intuition based decision-making.

The key to your decision-making approach is having an agreed process, so it works.

- Develop a simple framework or checklist to guide decision-making. This can include key questions to ask or factors to consider.
- Define criteria for different types of decisions (e.g. high, medium, low risk), strategic alignment, ROI, resource requirements, and urgency.
- Organise meetings or discussions to finalise the prioritisation. Ensure that all concerns are addressed and consensus is reached.
- Once agreed upon, document the final prioritisation and any associated decisions or action items.

# **Making data meaningful ≠ making data mean what you want**

Your performance metrics are there to help you assess how the business and your team members are travelling...

They are not always going to be forward moving.

Think about fitness, where progressive overload is a standard way of improving performance. No matter how technically sound a fitness program is, you can't keep making improvements in a straight line... muscle repair, nutrition, other factors in life, etc.

It's the same with your business.

When measuring team performance, remember that burning out your team will only get things so far before it all falls the heck apart. Keep an eye on the human side of performance and you can balance the hard KPIs with sustainable expectations...

And adjust performance requirements as you go, or reprioritise to focus on the most value-adding goals, or the most important expectations of your investors.

Importantly, be transparent about the assumptions used when sharing reports with investors or between teams so everyone has a realistic picture of what is happening and what can be expected.

## **Correlation does not imply causation**

In practicality when looking at your reports, you can use this to remind yourself that what seems like a relationship between two different metrics on first view, may be more of a coincidence than an actual statistical relationship.

A simple example - you are looking at your high level reports and see that your orders for a particular range of solar panels has increased rapidly over multiple orders and this makes you believe that this particular product has increased in demand overall, seasonality not coming into play. Upon speaking to your sales rep you learn that all the orders are actually from a single client due to their fluctuating cashflow.

The point being, before relying too heavily on data it is healthy to look a bit further to identify any other reasons that may be influencing what you are seeing.

Our brains are wired for confirmation bias (refer to table above) - because it makes our daily lives possible, without it our brains would explode... but at times this can lead to decisions that we are "sure of" yet don't turn out the way we expected.

Over-analysis has its drawbacks of course, it's about mitigating risk, in the above example the risk is getting stuck with excess inventory that you may not be able to move.

# REVENUE TACTICS

There is so much sales and marketing information online that it all becomes a wish-wash of confusion.

We'll stick with some core revenue tactics for you to focus on rather than creating another list of every-single-marketing-tactic-in-the-world.

And if you are left with any questions – throw them our way.

## No BS Sales

### **Meeting where they are at, not where you want them to be at**

When you are approaching sales conversations and the development of sales tools, you want to consider and understand where your prospects thoughts and attitudes about your solution will be when you engage with them.

We all have differing professional experience, knowledge sets, and communication styles. Focusing on how best to sell to your average prospect means taking these things into account so you can understand their expectations and the reality of what are the actual primary versus secondary drivers for choosing your solution.

Gaps in communication are common and we can generally bridge the gap, though if you have complete misses then you will struggle to get into their shortlist of options, or have unexpected breakdowns during the contract phase when you had complete confidence you had won their business.



Aligning your actions with your stakeholders truth will help to foster more effective and empathetic relationships.

To support this end, avoid overwhelming them with too much information upfront, rather break down complex information into manageable chunks. And acknowledge their concerns by empathising with their situation with shared experience.

Your solution might seem obvious and simple to you, whereas some of your prospective clients will be new to your product category or even industry, keep this in mind and the sales process will be smoother for all.

### **Your Sales Audience: Who you are speaking to**

Here are some thought starters to outline who your target audience is, so your sales assets are effectively talking to the needs of your ideal prospects:

- Do your prospects have a defined role, or group of roles?
- Are they investment focused or technically focused?
- Do they have to justify their decisions through a reporting line, and if so how many stakeholders are involved?
- What will block them from making a decision / who in their organisation will block them from making a decision?
- Will they generally be in a certain age range, such as senior managers with young engineers “auditing” the technical aspects... or will they themselves also be the technical check?
- Will they want support with their business case?

## **The Battle Card**

One sales tool that is often left till last, yet is your sales teams best friend is a strong battle card. This brings all the core messaging for your solution into one place, ready for them to reference right before they have a sales discussion. Exactly what an experienced sales rep needs to get everything front-of-mind so they can do what they do best.

To get a wider view of sales enablement tools, take a look at our article:

- [Sales Enablement for Climate Tech](#)

# The Battle Card - Template

<b><u>Product Name</u></b>			
<b>Pricing</b>		<b>Latest Release Date</b>	
<b>Core Use Case</b>		<b>Competitors</b>	
<b>Target Client</b>			
<b>Why We Win - Value drivers</b>			
<b>Feature</b>	<b>Advantage</b>	<b>Benefit</b>	
<b>Selling Tips</b>		<b>Client Review / Testimonial</b>	
<b>Objection</b>		<b>Response to handle objection</b>	

# No BS branding

In the beginning, branding is important but does not require massive investment.

It is about ease of use and clarity for both your clients and your team.

In practical terms, if you have 2 people working closely together, sales and branding are going to naturally align, if you have 20 people all doing different things then the inconsistencies will start to be confusing.

Branding is about a consistent approach to communicating the value of your business.

We all know the visual aspect of branding, the look and feel of your marketing collateral and website being the common applications. Beyond the visual aspects of branding is the type of energy and expertise your brand needs to portray to your prospects and clients.

## **Core Messaging:**

Your messaging is the succinct version of the value of your brand, of your solutions.

This core is then the point-of-truth that is disseminated across all your sales and marketing material and communication. It does not have to be the rule at all times, but you don't want to strongly deviate from this core.

<b><u>Client Value Proposition</u></b> <i>A succinct statement of the unique value of your brand / solution.</i>	
<b>Customer needs:</b> <ul style="list-style-type: none"> <li>•</li> </ul>	<b>How we solve them:</b> <ul style="list-style-type: none"> <li>•</li> </ul>
<b>Key benefits:</b> <ul style="list-style-type: none"> <li>•</li> </ul>	<b>Supporting data and/or client testimonial:</b> <ul style="list-style-type: none"> <li>•</li> </ul>
<b>Elevator Pitch</b> <i>Bringing together the value across the above areas to deliver 1 - 2 sentences that speaks to the value drivers your target market requires.</i>	

## **Tone of Voice:**

Define your brand's voice and tone to align your communications so they reflect a consistent tone, as if they came from the "same person". This can then be used across your teams as they write email comms through to exit surveys and everything in between.

You do not need to overthink it, it is helping to direct the thought process rather than specific demands.

It is about bounding your teams creativity so your communications align to your business and how your ideal clients are comfortable being communicated with.

It may help to think of your Tone of Voice as being part of your brand personality if your brand was one particular character type.

The following list provides opposing traits that you can use to define your brand's tone of voice, using the attributes that best align with your business' value, expertise, and target market.

- Professional vs. Casual
- Clear vs. Complex
- Precise vs. General
- Authoritative vs. Humble
- Innovative vs. Traditional
- Supportive vs. Detached
- Engaging vs. Formal
- Transparent vs. Guarded
- Reliable vs. Risky
- Analytical vs. Intuitive
- Empathetic vs. Impersonal
- Dynamic vs. Static
- Educational vs. Assumptive
- Consistent vs. Varied
- Customer-Centric vs. Company-Focused
- Conversational vs. punchy

### **Employee Behaviour:**

Your employees deliver on what you promise your clients, including how they interact with your clients. Providing them some high-level guidance to influence their behaviour can help to direct their interactions.

If service and control are at the core of your brand, you may train your employees to go above and beyond with aftermarket support, as standard. They will know you support them in guiding clients with a sense of control, as an extension of yourself.

If humor is a core value of your brand, your employees have a sense of being able to have a harmless joke with your clients to keep the mood light and open up conversations.

When your team knows what you are expecting when they interact with clients, it empowers them to deliver within the bounds of what you want your business to stand for, giving a consistency in communication that can help to reduce experiences that differ so much for your clients that they feel like they are dealing with a different business each time you engage with them.

# No BS Email Automation

Email automation is cost effective and replaces the general enquiries of yester-year.

A solid starting point is to identify the common questions you and your team are answering regularly, getting these conversation points into automated emails that are sent to prospective clients, saving you and your team time by avoiding the relentless mouse-on-a-wheel approach many new businesses will have.

This enables you to outline the core points you want your prospects to be aware of before speaking to you, by providing them with up-front education for the ubiquitous value drivers and tech specifications that the majority of them will ask for sooner or later.

This is an easy way to shorten the sales cycle because they will be ready to have a more informed discussion upfront.

Then split out these key areas into individual emails rather than trying to tell them everything at once. None of us have the excess brain energy, on a daily basis, to learn everything about a complex technical solution... especially one we have minimal to no experience with.

When it comes to email automation, there are some base level administration activities that are helpful in supporting the success of your email program:

- List Management: Regularly clean and update your email list to maintain deliverability and engagement.

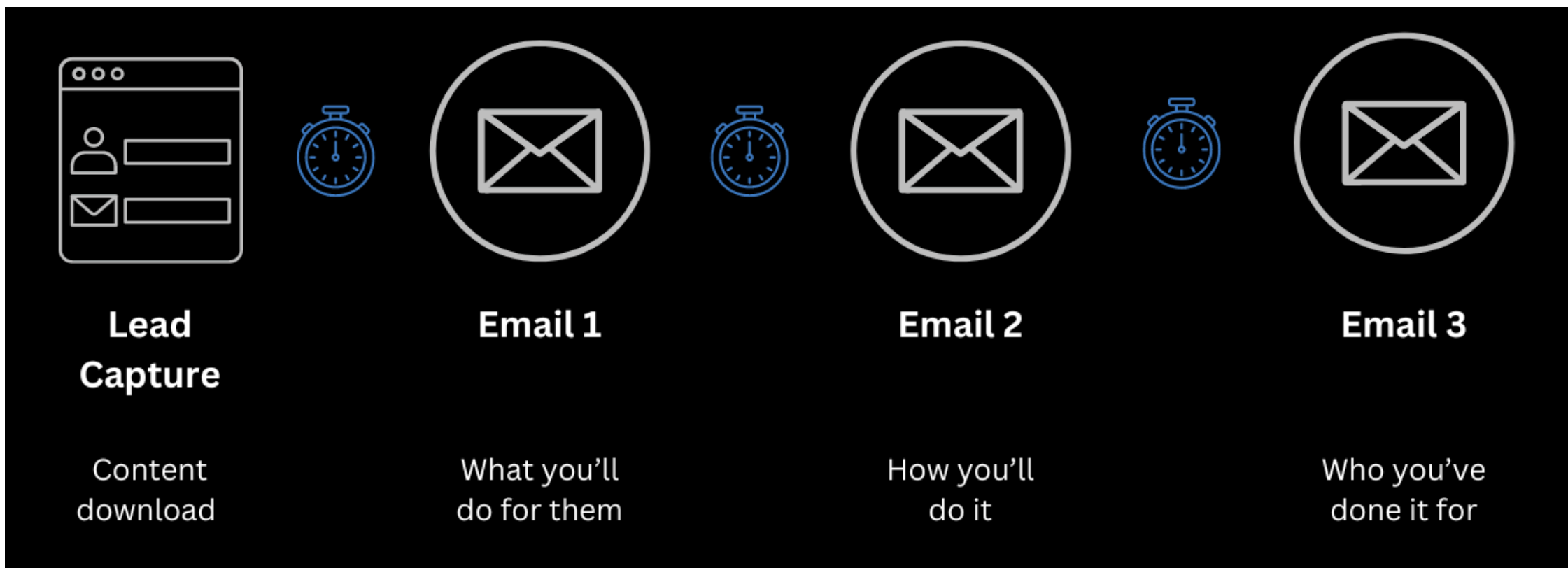


- List Segmentation: Divide your email list into segments based on criteria such as behavior, demographics, or purchase history. Use real-time data to update segments automatically as client behavior changes.
- Tracking Frequency of emails, both automated and manually sent: Set appropriate email frequency to avoid over-communication and ensure engagement.
- Event Triggers: Set up triggers based on specific actions (e.g., sign-ups, purchases, website visits).

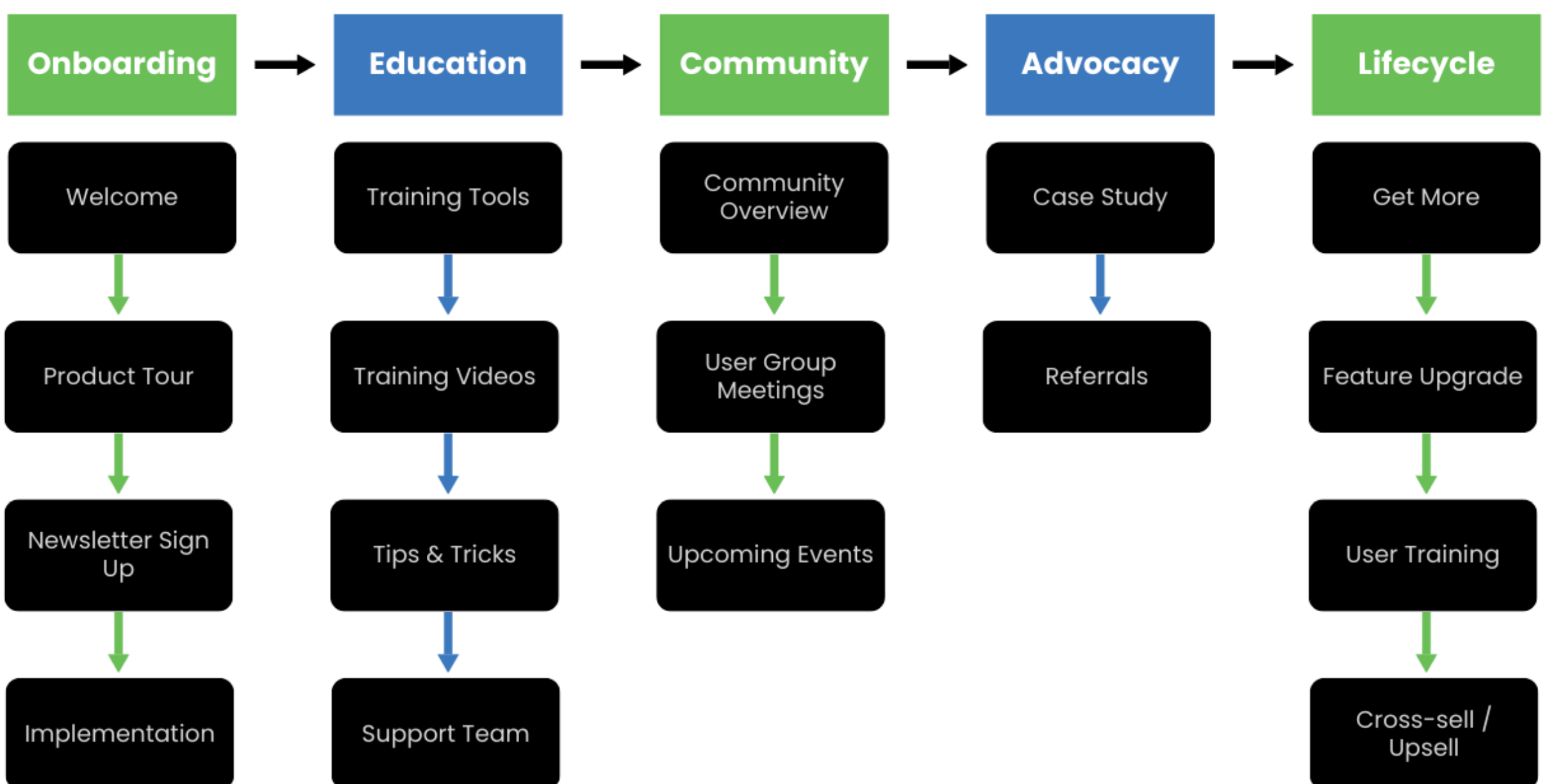
Building out your email program may utilise some or all of these aspects of automation builds, starting with the most commonly used through to logic for more advanced programs:

- Send Timing: Determine optimal send times based on user behavior and time zones. If you don't have data to refer to, using common sense is a suitable starting point.
- Dynamic Content: Use personalisation tokens and dynamic content blocks to customize emails based on user data and research
- A/B Testing: Test different subject lines, content, and designs to optimize performance.
- Condition-Based Logic: Implement if-then conditions to personalize and tailor email content based on recipient actions or attributes.
- Behavioral Triggers: Automate emails based on user interactions and behaviors (e.g., abandoned cart reminders, follow-ups).

Here is an example of a lead generation email sequence, built to automatically send the emails following a prospect completing your content download form.



Over time you can build out your email “infrastructure” to be an end-to-end automation program that covers your entire client journey, supporting your team by reducing their reactive workload, providing consistency in client engagements, and enabling data-informed marketing and client lifecycle iterations.



# No BS Social

As a tech startup founder that does not naturally engage heavily with social media, you are going to be best served focusing on quality over quantity, or outsourcing your social media activity.

Social media platforms are used to evaluate businesses, so it is important have some posts that align with your business solutions and display your value.

It can also be used to share team successes, building engagement with your employees which can be great for morale and sharing wins.

Before you get too deep into social media tactics... just post relevant content, news, and product updates. There are ways to enhance your social posts as you increase frequency, but until you are posting regularly it can distract you from the simplicity that social is intended for.

Join relevant industry groups or forums and contribute to discussions to build your presence and credibility.

## **Go where your audience is**

- Choose platforms where your target audience is most active
  - LinkedIn for B2B
  - Twitter for tech news
  - Reddit for community discussions
- What topics and trends are they interested in, particularly in the tech sector?

## **Planning social posts**

- Create a realistic content calendar to plan and schedule posts in advance
- Share a mix of content such as blog posts, industry news, product updates, case studies, and educational resources.
- Focus on creating high-quality content that adds value, such as insightful articles, whitepapers, or technical guides that will appeal to your target market
- You can use tools like Hootsuite, Buffer, or Sprout Social to schedule posts

# Resin8

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