



3d Consulting Services
Making Selling Simple

It'll Never Work For You If You Don't Use IT!

**How To Turn That Pile of Business Cards On Your Desk
Into A Smart, Ever Expanding Database That Identifies
Prospects Who Are Looking To Buy What You Offer!**



3d Consulting Services



3d Consulting Services

Making Selling Simple



Tim Dodd

Chartered Accountant

Practice Manager

Practice Management Consultant

Professional CRM Process Mechanic

(Definitely NOT a programmer!)

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In The Beginning...





- 10 new contacts per week (networking etc.)
- 500 new contacts per year
- In business for 3 years? => 1500 contacts
- Spend 5 mins re-connecting with each contact
- $1500 * 5 = 7500$ minutes = 125 hours (>15 full work days)
- Per quarter so that's 4 times per year...

You're Having A Laugh!



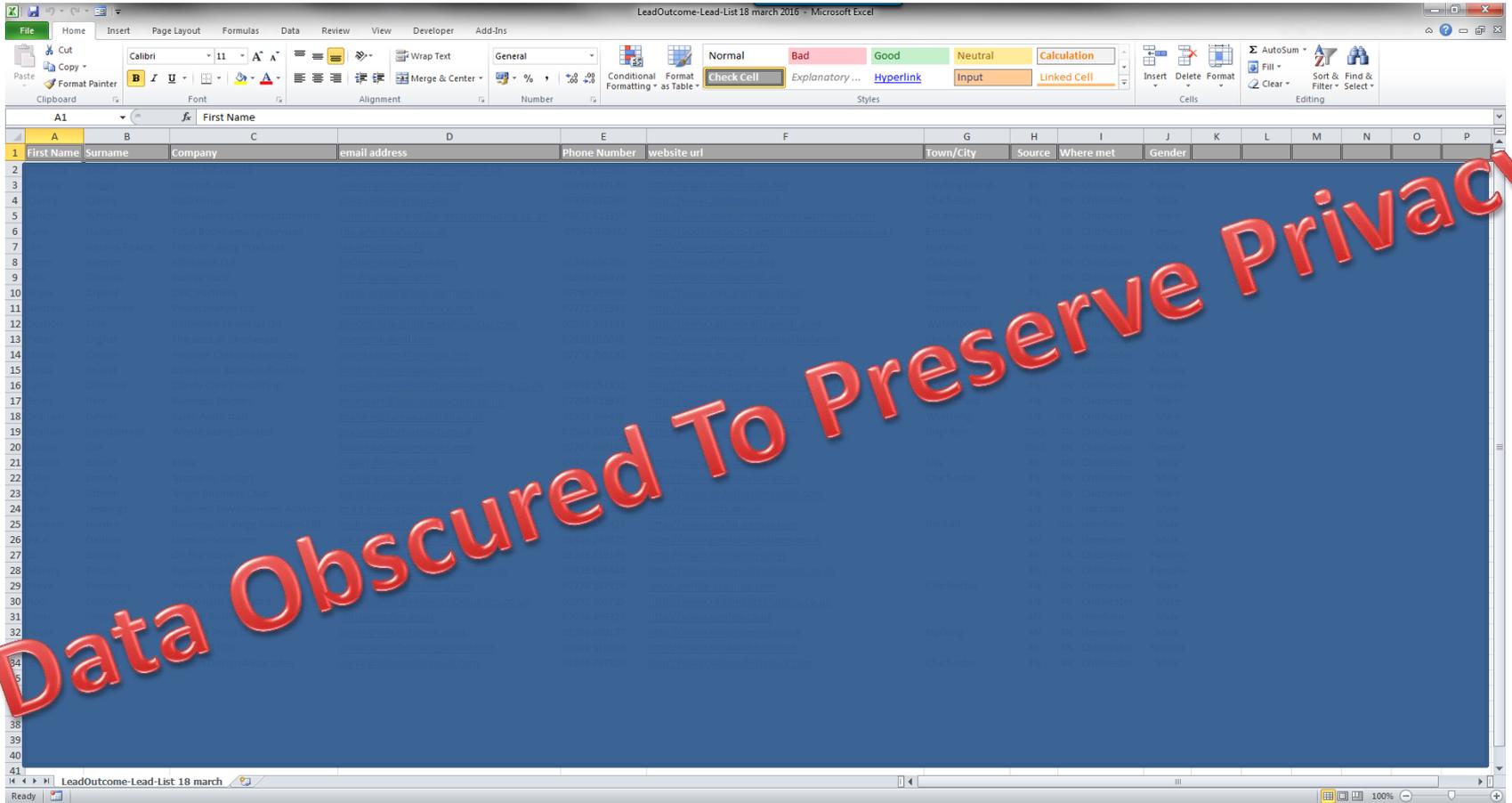
- 2 - 3% of your audience are actively looking to buy at any point in time
- 2% of 1500
- approx 30 hot prospects

But How Can You Find Out Who?

Back To The Stack of Cards...



Collate Details Into A Simple Spreadsheet...



Simple Template with Input Form...

The screenshot displays a Microsoft Excel spreadsheet titled "3d_CRM_Data_Import_Spreadsheet_withinputform". The spreadsheet has a header row (row 1) with the following columns: First Name, Surname, Company, Email address, Phone number, Website url, Town/City, Source, and Gender. Row 2 contains the following data: Tim, Dodd, 3d Consulting Services, tim@3dconsultingservices.com, 07710 268322, www.3dconsultingservices.com, Pulborough, 4N, and M. A data entry form titled "Sheet1" is overlaid on the spreadsheet, containing input fields for each of the columns in row 2, with the data from row 2 entered into the fields. The form also includes buttons for "New", "Delete", "Restore", "Find Prev", "Find Next", "Criteria", and "Close".

1	First Name	Surname	Company	Email address	Phone number	Website url	Town/City	Source	Gender
2	Tim	Dodd	3d Consulting Services	tim@3dconsultingservices.com	07710 268322	www.3dconsultingservices.com	Pulborough	4N	M

This simple Spreadsheet template is available to download from www.3dConsultingServices.com/CRMDataSheet

Import Into Your CRM System...

Lead Import Wizard

Step 1: Lead Category for Imported Leads

Select Lead Category: My Contacts

Step 2: Select File & Source Profile

* File to Import: 3d_CRM_Data_Import_Spreadsheet3... Choose File * Source Profile: Custom Import

Step 3: Import Options

Update Duplicate Leads - Update the existing lead with any changes to their contact information but DO NOT create a duplicate record.

Create Duplicate Leads - Import and create ALL leads even if a duplicate exists

Terms

I confirm that I will only add individuals and prospects that I know, and/or that have given me permission to be contacted via email. I will NOT add any leads without said permission. I understand that any violation of these terms can result in the immediate suspension of my account.

Next

And You're There...

Manage Leads ➕ Add New Lead 📖 Show Me How

✔ Your default column selection for the Lead Management page has been successfully updated.

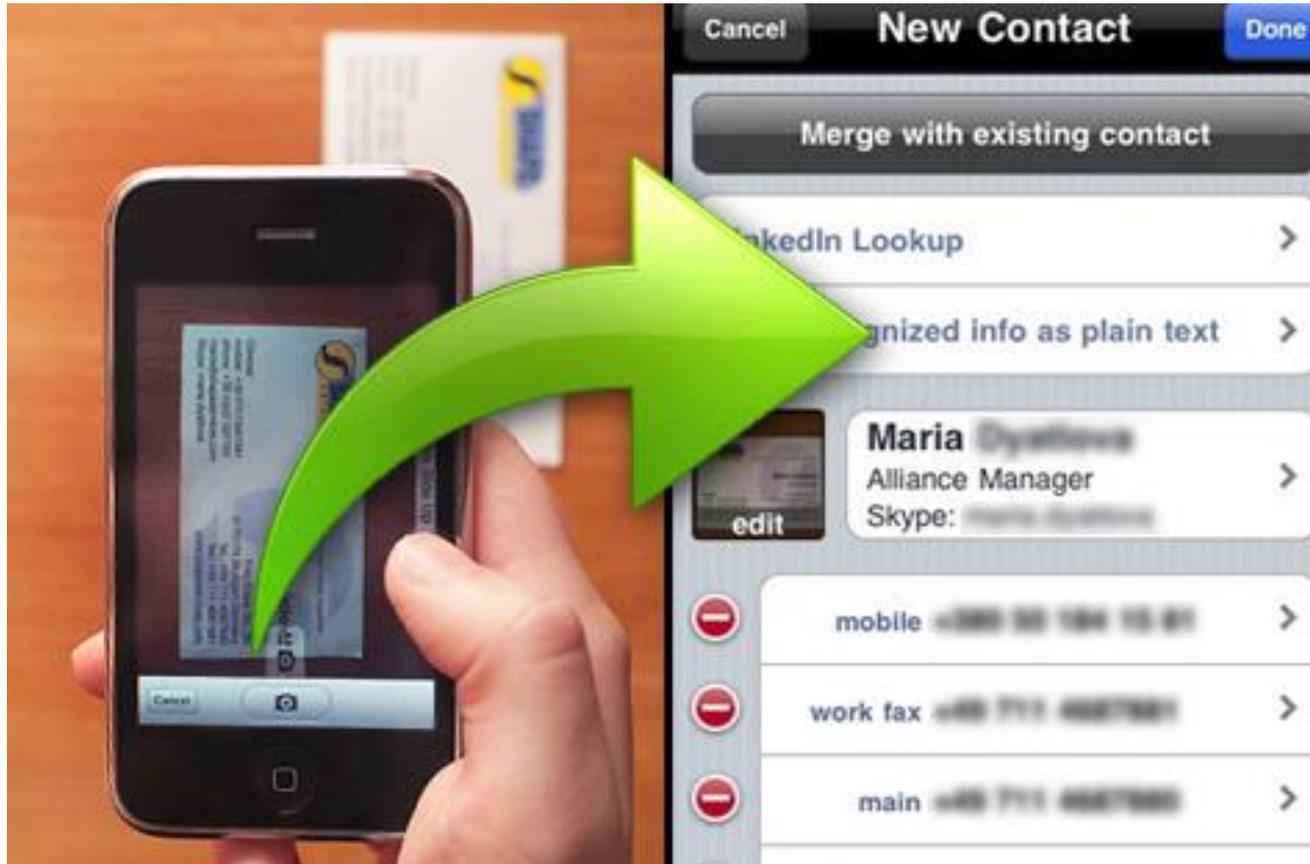
The Manage Leads page allows you to see the latest activity of your leads. You can use the Category filter or Search function to isolate groups of leads, and then use the Select Action drop down to send emails, assign campaigns, or do bulk updates. Click on the ID number to see the full History of a lead.

Filter by Category Filter By List Enter Search Term 19 Leads (0 Selected)

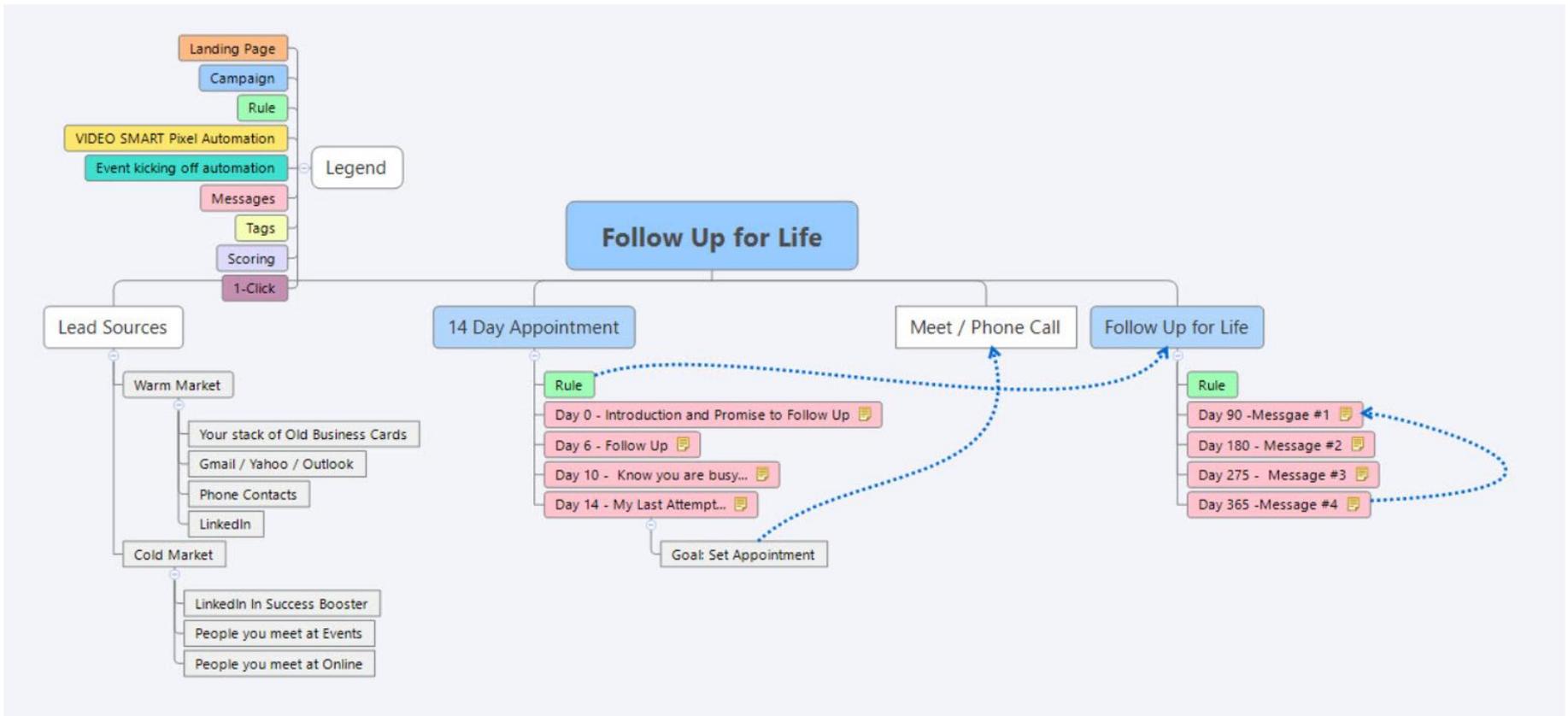
Profile	First Name	Last Name	Company	Email	Phone Number	Business Website	Lead Rating	Score	City	Source	Where Met	Last Activity	Created
<input type="checkbox"/>												6/10/16 10:38 AM	6/10/16 4:05 AM
<input type="checkbox"/>												6/13/16 12:44 PM	5/6/16 5:13 AM
<input type="checkbox"/>												4/7/16 10:38 AM	3/16/16 6:51 AM
<input type="checkbox"/>												5/13/16 7:00 AM	5/6/16 4:59 AM
<input type="checkbox"/>												6/10/16 7:00 AM	6/3/16 5:03 AM
<input type="checkbox"/>												5/27/16 8:08 AM	5/20/16 5:06 AM
<input type="checkbox"/>												4/7/16 10:38 AM	2/29/16 5:48 AM
<input type="checkbox"/>												6/16/16 2:00 AM	3/11/16 5:06 AM
<input type="checkbox"/>												6/3/16 11:07 AM	5/6/16 4:05 AM
<input type="checkbox"/>												4/15/16 7:00 AM	4/8/16 5:15 AM
<input type="checkbox"/>												6/2/16 2:00 AM	2/26/16 4:56 AM
<input type="checkbox"/>												6/2/16 2:22 AM	2/26/16 4:53 AM

Data Obscured To Preserve Privacy

Simplify Input By Using Photo Card Reader...



Map Out What You Want To Happen...



Create Your Master Email Templates...

Edit Campaign Email

Campaign Email Details

- Name: Business Card Photo Follow-Up
- Subject: Business Card Photo Follow-Up...
- Reply Address: Custom
- Increment Score By: 10
- Reply Name: Tim Dodd
- Reply Email: tim@3dconsultingservices.com
- Theme: Custom Email / No Theme
- Campaign: 3d - Business Card Photo - Follow-Up
- Description: Business Card Photo Follow-Up Message 1 Shortly After The Business Card Has Been Snapped.
- Follow-Up: [Empty text area]
- Active: Yes

Step Campaign Details

- Send on Day: 0

Email Body

Hi **Lead.firstName**,
I thoroughly enjoyed our meeting earlier today.
Thank you for allowing me to demonstrate my Smart Business Card Photo Follow-up process.
You have received this message without any further intervention from me and I can now track and monitor emails that you open, items you look at on my website and any other relevant action you may take! What is more the system will allocate a score to each action you take so that I'm able to identify those prospects who are particularly interested in my services and ensure that I spend the majority of my time talking with my best prospects.
I can also guarantee that you will hear from me again!
If you appreciate the simplicity of this approach and can see how it would help you win more new business for yourself then please don't hesitate in getting in touch with me.
I look forward to hearing from you soon.
Kind regards

Buttons: [\[need help.\]](#) [Check Spam Score](#) [Save Email](#) [Chat now](#)

Drip Feed Follow-Up Information...

The screenshot displays the LeadOutcome CRM interface for managing a campaign. The browser address bar shows the URL: 3d.leadoutcome.com/app/mce/marketing/campaigns/view?id=13748. The navigation menu includes Dashboard, Leads, Marketing (active), Integration, Affiliate, Marketplace, and Help. A sub-menu for Marketing shows Overview, 1-Click Emails, Campaigns (active), Landing Pages, Image & Doc Library, Email Themes, Variables, and Rules. The main content area is titled "View / Manage Campaign" and shows details for a campaign named "3d - Business Card Photo - Follow-Up". The campaign type is "Step Campaign" and the description is "Photo Card - Follow-Up Series". Below this, there is a section for "Campaign Items (4)" which contains a table with the following data:

Name	Day	Hour	✉	✉	✓	🗑	!	⚙
Business Card Photo Follow-Up	0	-	81	53 (65.43%)	2 (2.47%)	1 (1.24%)	0 (0.0%)	⚙
Business Card Photo Follow-Up 2	1	10	72	43 (59.72%)	3 (4.17%)	0 (0.0%)	0 (0.0%)	⚙
Business Card Photo Follow-Up 3	3	20	65	30 (46.15%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	⚙
Business Card Photo Follow-Up 4	7	12	67	32 (47.76%)	3 (4.48%)	0 (0.0%)	0 (0.0%)	⚙

At the bottom of the campaign view, there is a section for "Active Campaign Subscribers (74)". The footer contains contact information for 3d Consulting Services, including a phone number (+44 (0)1798 873421), address (Pulborough, W. Sussex RH20 1RH), and a link to "Send me an email". There are also social media icons for Twitter, Facebook, and LinkedIn. The footer also includes a "LEADOUTCOME" menu with links to Dashboard, Leads, Marketing, Integration, Affiliate, Marketplace, and Help, and a "HELP & SUPPORT" menu with links to Have a Suggestion?, Contact Support, Report Abuse, Privacy Policy, Terms and Conditions, About Us, and Testimonials.

Create Multiple Multi-Part Campaigns...

Campaigns + Add New Campaign ? Show Me How

Create a series of emails that go out on a set schedule. Its easy....write the emails, set the schedule, assign the campaign, jump into your recliner and let LeadOutcome do the rest. Isn't automation great?

My Campaigns

Email	Type	Subscribers	✉	✉	✓	✖	!	Modified	
3d - Business Card Photo - Follow-Up	Step	78	285	158 (55.44%)	8 (2.81%)	1 (0.35%)	-	2/24/16	⚙️
Selling - Exhibitor Follow Up for Life Kit - Intro	Step	0	0	-	-	-	-	2/17/16	⚙️
Selling - Follow Up for Life Kit - Intro	Step	0	0	-	-	-	-	2/17/16	⚙️
zzFFL:01:Appointment (14 Day) [MASTER COPY]	Step	0	0	-	-	-	-	2/17/16	⚙️
zzFFL:02:Quarterly Follow Up for Life [MASTER COPY]	Step	0	0	-	-	-	-	2/17/16	⚙️
zzSelling - Exhibitor Fufl Kit - Intro [MASTER COPY]	Step	0	0	-	-	-	-	2/17/16	⚙️
zzSelling - Follow Up for Life Kit - Intro [MASTER COPY]	Step	0	0	-	-	-	-	2/17/16	⚙️

Campaign Kit Campaigns :: The Ultimate Follow Up for Life Campaign Kit - Just \$299

Email	Type	Subscribers	✉	✉	✓	✖	!	Modified	
FFL:01:Appointment (14 Day)	Step	1	5	-	-	-	-	2/14/16	⚙️
FFL:02:Quarterly Follow Up for Life	Step	64	13	8 (61.54%)	-	-	-	2/14/16	⚙️
FFL:02:Quarterly Follow Up for Life [Copy]	Step	0	0	-	-	-	-	2/19/16	⚙️

Regular One-Off Messages...

The screenshot displays a web browser window with the URL `3d.leadoutcome.com/app/mce/marketing/1-click-email-library/templates/edit?emailTemp.id=29164&editEmail=true&emailTempCategory.id=4145&tempType=Lead`. The page title is "Edit 1-Click Email".

The main content area is titled "Edit 1-Click Email" and contains two sections:

- 1-Click Email Details:** This section contains several form fields:
 - * 1-Click Name: Instant Traffic Flow Notes
 - * Subject: Your Instant Traffic Flow Process Notes...
 - * Reply Address: Custom
 - * Increment Score By: 5
 - * Theme: Custom Email / No Theme
 - * Category: 3d - Process Notes
 - * Reply Name: Tim Dodd
 - * Reply Email: tim@3dconsultingservices.com
 - Description: Instant Traffic Flow Process Notes Access Email
 - Follow-Up: (Empty text area)
 - Campaign Kit: Select Campaign Kit
- Email Body:** This section features a rich text editor with a toolbar. The content of the email body is:

Hi Slead firstname,
.....
Thank you for requesting a copy of my Instant Traffic Flow process notes.
In case you haven't already accessed them, you can get back to them by [Clicking Here](#).
These notes are designed to help you to set-up your social media pages so that every day more people will get to know, like and trust you than did the previous day, driving a ton of new visitors to your website.
And, whilst I aim to address all the questions you may have, it is quite possible that you'll come up against something that isn't covered, in which case please don't hesitate to contact me and I'll do my very best to help.
Here's the [link to your Instant Traffic Flow process notes again](#).
I trust you'll find the notes useful and look forward to hearing what you think.
Kind regards
Tim

& Quarterly Thinking of You Touches...

Edit Campaign Email

Campaign Email Details

- Name: FFL-MSG1-Q2
- Subject: RE: How's Business...
- Reply Address: Custom
- Increment Score By: 10
- Reply Name: Tim Dodd
- Reply Email: tim@3dconsultingservices.com
- Theme: Custom Email / No Theme
- Campaign: FFL02:Quarterly Follow Up for Life
- Description: Soft touch... resist the urge to make an offer. Have a curiosity line. A relationship is a 2 way conversation. Ask a question "How are you doing?"
- Follow-Up: and increases in Lead Scoring (set up Advanced Searches to filter these leads). You will also get reply emails when you least expect it from people that need your help right now!
- Active: Yes

Step Campaign Details

- Send on Day: 180
- Send Time: 8:00am

Email Body

Hi Slead.firstName,

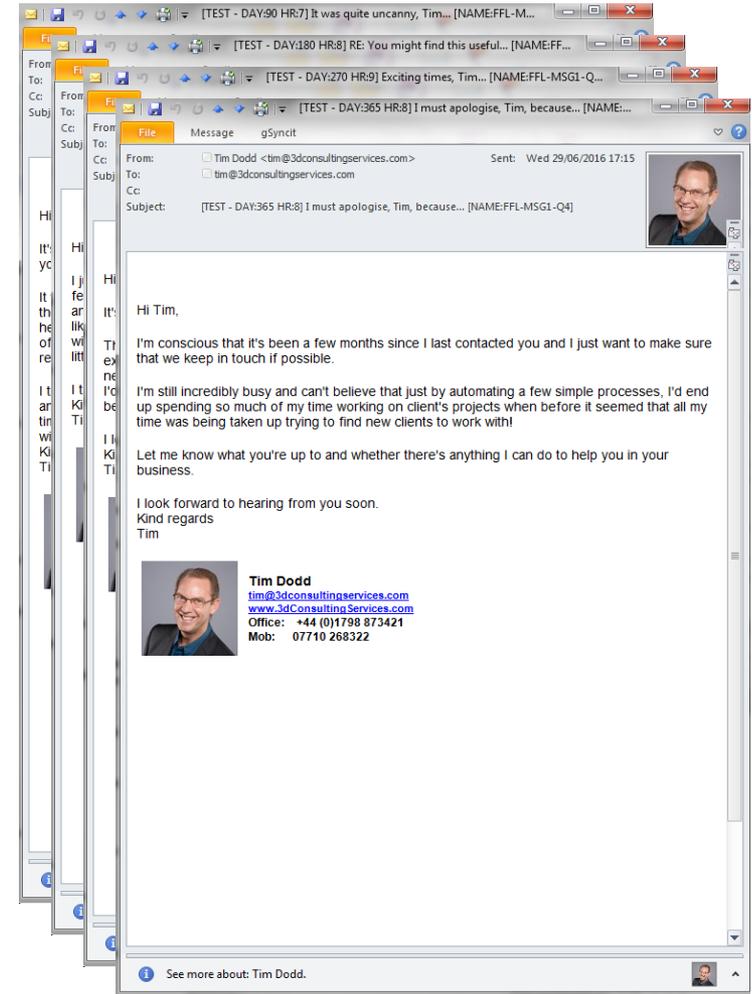
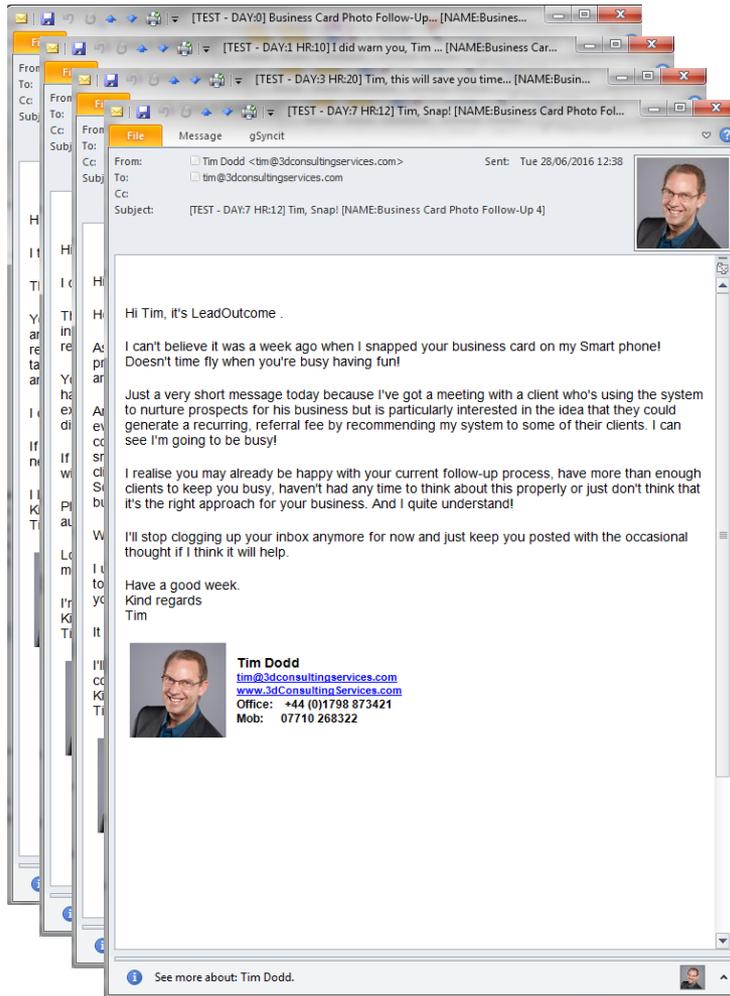
I just thought I'd check in with you again with a brief update of what's been going on in the last few months. I've recently started working with a couple of new but really exciting new clients and some of the automation we've put in place I'm sure would prove really useful to someone like you. I don't know exactly what you're up to at the moment, or whether you'd be able to cope with the influx of new business these systems are currently producing but if you'd like to hear a little more then do get in touch.

I trust you're well and look forward to hearing from you soon.

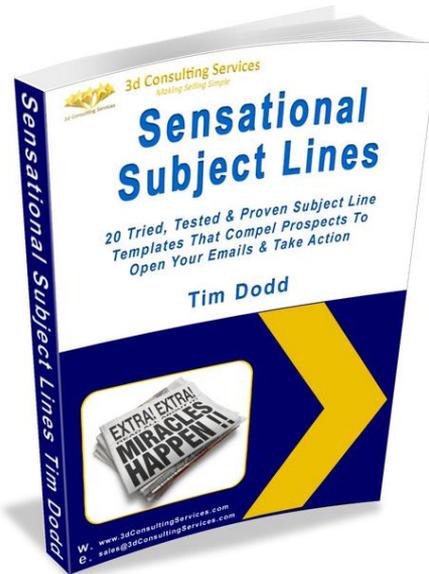
Kind regards
Tim

Tim Dodd
tim@3dconsultingservices.com
www.3dconsultingservices.com
Office: +44 (0)1798 873421

Recognise Any Of These?



Offer Your Contacts Something Of Value...



Thank You!

You now have access to the 20 Sensational Subject Line templates and can start writing emails your prospects want to open instantly!

[Click Here to Access Your Templates](#)

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And Track Who Accepts It...

3d Consulting Services — Wo... x +

www.3dconsultingservices.com/wp-admin/post.php?post=3307&action=edit&sub2editor=true

INSTABUILDER 2.0 Visit Page Change Permalink Variation A

3d Consulting Services

Sensational Subject Lines
20 Tried, Tested & Proven Subject Line Templates That Compel Prospects To Open Your Emails & Take Action
Tim Dodd

Thank You

You now have access to the 20 Sensational Subject Line templates and can start writing emails your prospects want to open instantly!

Click Here to Access Your Templates

Code Settings
Code (HTML/CSS/JavaScript)

```
<!-- START SMART PIXEL - DO NOT EDIT-->
                                         | Assign Category: <input type="text" value="Hot Prospect"/>                                                  |
| Assign Campaign: <input type="text" value="--Select Campaign--"/>                                              | Unassign Campaign: <input type="text" value="--Select Campaign--"/>                                         |
| Assign Tag(s): <input type="text" value="R02 - Sensational Subject Lines"/> <input type="button" value="Add"/> | Unassign Tag(s): <input type="text" value="--Select Tag to Unassign--"/> <input type="button" value="Add"/> |
| Score: <input type="text" value="20"/>                                                                         | Transfer Lead To: <input type="text" value="Find Member"/>                                                  |
| 1-Click Email: <input type="text" value="Sensational Subject Line Templates"/>                                 | Schedule 1-Click Email: <input type="checkbox"/>                                                            |
| Email Notification: <input type="checkbox"/>                                                                   |                                                                                                             |

# So You Know Who To Follow-up In Person...

Your daily lead activity summary - Message (HTML)

File Message gSyncIt

Ignore X Meeting Move to: ? To Manager Rules ~ OneNote Mark Follow Translate Find Zoom  
Junk - Delete Reply Reply Forward More - Team E-mail Reply & Delete Move Actions ~ Tags ~ Related ~ Select ~ Zoom  
Delete Respond Quick Steps Move Tags Editing Zoom

If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: LeadOutcome Support <support@leadoutcome.com>  
To: tim@3dconsultingservices.com  
Cc:  
Subject: Your daily lead activity summary

Sent: 5/11/2011 11:08

### Daily Lead Activity Summary

Tim,

Knowing the daily activities and areas of interest for your leads will help guide your next steps. Activities tracked include: web pages visited, videos watched, emails sent, and more.

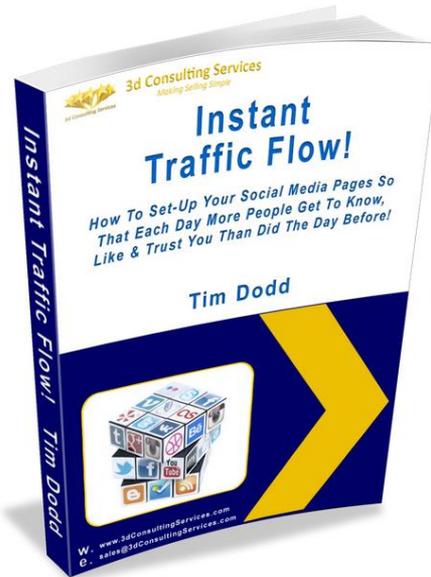
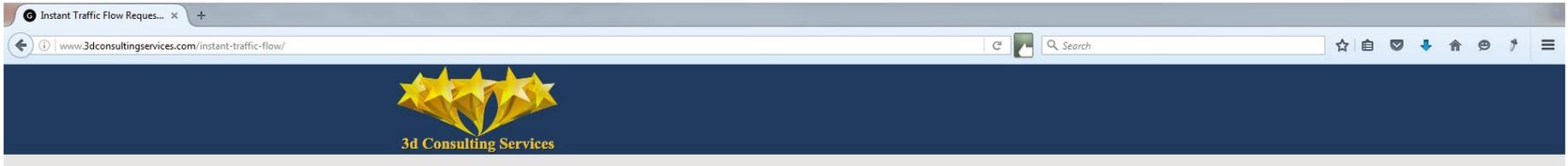
Here is a summary of your lead activities from yesterday

| Lead Name                                                                                                                           | ID | Email | Date | Score |
|-------------------------------------------------------------------------------------------------------------------------------------|----|-------|------|-------|
| 4N - Horsham                                                                                                                        |    |       |      | 70    |
| 4N - Horsham                                                                                                                        |    |       |      | 70    |
| 4N - Horsham                                                                                                                        |    |       |      | 80    |
| Email Named: Follow-up with Link to Download Spreadsheet Template                                                                   |    |       |      |       |
| [the Spreadsheet Data Import Template] link within the email named Follow-up with Link to Download Spreadsheet Template was clicked |    |       |      |       |
| Email Named: Follow-up with Link to Download Spreadsheet Template                                                                   |    |       |      |       |
| Your lead has opened the 1-click email [ Follow-up with Link to Download Spreadsheet Template ]                                     |    |       |      |       |
| Your lead has opened the 1-click email [ Business Card Photo Follow-Up ]                                                            |    |       |      |       |
| Your lead has opened the 1-click email [ Business Card Photo Follow-Up 2 ]                                                          |    |       |      |       |
| Your lead has opened the 1-click email [ Business Card Photo Follow-Up ]                                                            |    |       |      |       |
| Campaign email [Business Card Photo Follow-Up 2] from Campaign [14 - Business Card Photo - Follow-Up] has been sent.                |    |       |      |       |
| Campaign email [Business Card Photo Follow-Up 2] from Campaign [14 - Business Card Photo - Follow-Up] has been sent.                |    |       |      |       |
| Campaign email [Business Card Photo Follow-Up 2] from Campaign [14 - Business Card Photo - Follow-Up] has been sent.                |    |       |      |       |

See more about: LeadOutcome Support.

**Data Obscured To Preserve Privacy**

# Or Attract Visitors Through Social Media...



**Do You Want To Attract More Visitors To Your Website FAST?**

**Discover How To Structure Your Social Media Pages So That Every Day More & More New People Are Getting To Know, Like & Trust You!**

[Click Here to Access Training Notes...](#)

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# Record New Prospects In Your Database...

Instant Traffic Flow Reques... x +

www.3dconsultingservices.com/instant-traffic-flow/

3d Consulting Services

**Start To Get Excited...**

**Instant Traffic Flow!**  
How To Set-Up Your Social Media Pages So That Each Day More People Get To Know, Like & Trust You Than Did The Day Before!  
Tim Dodd

You're Just A Moment Away From Discovering How To Set-Up Your Social Media Pages So They Consistently Attract New Prospects!

(Enter your name & primary email to access)

First Name \*

Email \*

**OK - Send It To Me Now...**

We respect your privacy & promise never to send unsolicited spam email.

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# & Trigger Relevant Follow-up Campaigns...

## Lead Capture Form Submission Behavior Show Me How

Choose what happens after the form is submitted.

Form Setup → Form Design → **Form Behavior** → Generate Code

### Choose Behavior

- Redirect**  
This option allows you to send new subscribers to a designated webpage after they submit the form. Possible redirect locations include your website, blog, or a customized "thank you" page.

**Redirect URL:**   
Prepend with http:// or https://



### Optional Behaviors

|                                                                               |                                                         |                                                                        |                                    |
|-------------------------------------------------------------------------------|---------------------------------------------------------|------------------------------------------------------------------------|------------------------------------|
| Assign Campaigns: <input type="text" value="-- Select Campaign"/>             | <input type="button" value="Add"/>                      | Remove Campaigns: <input type="text" value="-- Select Campaign"/>      | <input type="button" value="Add"/> |
| Send 1-Click Email: <input type="text" value="Instant Traffic Flow Notes"/>   |                                                         | Schedule 1-Click email: <input type="button" value="Schedule"/>        |                                    |
| Assign Tags: <input type="text" value="--Select Tag to Add--"/>               | <input type="button" value="Add"/>                      | Unassign Tags: <input type="text" value="--Select Tag to Unassign--"/> | <input type="button" value="Add"/> |
|                                                                               | <input type="text" value="R11 - Instant Traffic Flow"/> |                                                                        |                                    |
| Assign Ad Code: <input type="text" value="ITF"/>                              |                                                         | Append Score: <input type="text" value="25"/>                          |                                    |
| Email Notification: <input checked="" type="checkbox"/>                       |                                                         | Send CC Email: <input type="text"/>                                    |                                    |
| Assign Category: <input type="text" value="Hot Prospect"/>                    |                                                         | Force New Lead: <input type="checkbox"/>                               |                                    |
| Assign Lead to: <input type="button" value="Find IR"/> 3d Consulting Services |                                                         | Campaign Kit: <input type="text" value="Select Campaign Kit"/>         |                                    |

# Turning Your Database Into Your Most Valuable Asset...

- **Categorise & Segment contacts**
- **Run wide ranging surveys that Collect & Collate data electronically**
- **Create relevant Upsell/Cross-sell campaigns**
- **Launch new products/services easily & cost effectively**
- **Offer Value Added Services**
- **Attract Joint Venture Partners**

# How To Identify The 2-3% Ready to Buy...

## Exciting News / Irresistible Offer

Day 1 Email

Day 2 Email

Day 3 Email

Day 4 Email

Repeat every 90 days

## 2 Essential New Website Pages

Complete Opt-in Form To Receive Offered Incentive

Automatically Sent By Return eMail

& Redirected To A Questionnaire

## Follow Up Process (Optional)

2 Weeks Left

1 Week Left

3 Days Left

Last Chance!

# Just For A Second...

- Imagine having a system that actually followed-up with your new contacts & regularly primed THEM to call YOU.
- Imagine having a system that saved you or your team 125 hours 4 times a year whilst keeping you in front of people who expressed interest in your product/service.
- Imagine having a system that identified 30 ready to buy prospects who already know, like & trust you...  
*several times a year.*

***Don't Just Imagine One – Implement One!***



## **Tim Dodd**

### **Professional CRM Process Mechanic**

*Helping You Convert More Prospects Into Happy, Profitable, Repeat Clients Faster By Using Your CRM System Intelligently*

**The Slides & the Data Input Spreadsheet  
Template Are Available To Download From**

**[www.CRMSuccess.co.uk](http://www.CRMSuccess.co.uk)**

**[www.linkedin.com/in/3dtimdodd](http://www.linkedin.com/in/3dtimdodd)**