

STAGE 2

Target Potential Buyers

Free Trial Use Case Example

Ideal Customer Profiles	<input type="checkbox"/> UNKNOWN	<input checked="" type="checkbox"/> KNOWN	<input checked="" type="checkbox"/> RETURNING	<input type="checkbox"/> TARGET ACCOUNT	<input type="checkbox"/> SALES ENGAGED	<input type="checkbox"/> CUSTOMER		
Channels	<input type="checkbox"/> Direct Traffic	<input type="checkbox"/> Referral Traffic	<input type="checkbox"/> Content Syndication	<input type="checkbox"/> Paid Search/Social	<input type="checkbox"/> Display Advertising	<input checked="" type="checkbox"/> Email Marketing	<input type="checkbox"/> Organic Search/Social	
Offers	<input type="checkbox"/> WEBINAR	<input type="checkbox"/> VIRTUAL EVENT	<input type="checkbox"/> CONTENT	<input type="checkbox"/> DEMO VIDEO	<input checked="" type="checkbox"/> NEWSLETTER	<input type="checkbox"/> CALCULATOR	<input type="checkbox"/> ASSESSMENT	
Website Experience	URL <input type="text" value="drift.com"/>			UTM <input type="text"/>				
Campaign	CAMPAIGN NAME <input type="text" value="Free_Trial_Upgrade"/>							
Engage Options	<input checked="" type="checkbox"/> Regular Playbook	<input type="checkbox"/> Triggered Playbook	<input type="checkbox"/> Embedded Playbook	<input type="checkbox"/> Conversational Content	<input type="checkbox"/> Live Chat	<input type="checkbox"/> Email	<input type="checkbox"/> Video	
Engage Hook	ENGAGE HOOK <small>100 characters or less</small> <input type="text" value="Thanks for being a loyal customer! Ready to take you [product name] experience to the next level?"/>							
Engage Response	<input checked="" type="checkbox"/> I'd like to chat with someone	<input checked="" type="checkbox"/> I'd like to learn more about your solutions	<input checked="" type="checkbox"/> I'm just browsing	<input checked="" type="checkbox"/> I'm looking for customer support				
Primary Call-To-Action	<input checked="" type="checkbox"/> ROUTE TO SALES			<input checked="" type="checkbox"/> DROP A CALENDAR				
Secondary Call-To-Action	<input checked="" type="checkbox"/> MARKETING OFFER	<input type="checkbox"/> SELF-SERVICE RESOURCE	<input type="checkbox"/> ROUTE TO CUSTOMER SUPPORT					
Business Outcome	<input checked="" type="checkbox"/> MEETING BOOKED	<input checked="" type="checkbox"/> OPPORTUNITY CREATED	<input checked="" type="checkbox"/> SALES ACTIVITY					
Buyer Outcome	<input checked="" type="checkbox"/> Chat Now	<input checked="" type="checkbox"/> Chat to Call	<input checked="" type="checkbox"/> Zoom Meeting	<input checked="" type="checkbox"/> Book a Meeting	<input type="checkbox"/> Education	<input checked="" type="checkbox"/> Demo Video	<input checked="" type="checkbox"/> File Support Ticket	<input checked="" type="checkbox"/> Chat with Support

ENGAGE HOOKS

1. Hey [name] 🙌 Need help figuring out which product is right for you?
2. Hey [name] - looks like you've been enjoying our product for X amount of days, ready to level up?
3. Thanks for being a customer! Ready to take your [product name] experience to the next level?

ENGAGE VALUE PROPOSITION

N/A

ENGAGE RESPONSES

[Yes, I am ready to take it to the next level]

<Awesome!>

<Routes to Sales>

[I'm actually looking for support]

<Route to Support>

[I'm not ready yet, can I learn more first?]

<Sure thing>

<Send Marketing Offer>