

Route and Repeat Roadmap

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Introduction

At Route Cause, we’ve adopted a strategic marketing system developed and refined by our co-founder Richard Bueckert since he began working in his family’s powersports business at the age of 12 in 1975. Since then, numerous small businesses have benefited from Richard’s process, which is now called the Route and Repeat Roadmap.

The Route and Repeat Roadmap explains to small business owners the common problems that they face as they’re trying to acquire new customers. We use it to share examples of the strategies that businesses that are most successful use to grow their business.

Rather than working harder, Richard suggests that small business owners looking to grow their companies work smarter by leveraging the Route and Repeat Roadmap, which can save time, energy, and money. After all, growing a business is directly tied to the experience that a company’s leads, prospects and customers have had and/or are having.

For the purposes of the Route and Repeat Roadmap, “marketing” refers to everything that your business does to get its unique value into the market. In other words, marketing, sales, and follow-up communication with customers.

The Route and Repeat Roadmap model provides a simple framework of three key systems that cover the nine phases of a customer’s journey. Small business owners can use these systems to design a marketing strategy that will help them attract potential customers, sell to them, and deliver an experience that impresses them and keeps them coming back, and with referrals.

Most businesses have three significant areas of waste, and if they plug those holes in their business, they could actually grow without needing to go out and spend a lot more money or even a lot more time.

The Route and Repeat Roadmap model is designed to address the “three significant areas of waste” I mentioned earlier. It creates:

- A system for collecting leads – **“Collect leads”**
- A system for converting those leads into paying clients and customers – **“Convert clients”**
- A system for taking those customers and creating fans who are buying more and telling friends about you – **“Create fans”**

Often, entrepreneurs suffer from ‘shiny object syndrome,’ and when they don’t have a method for categorizing and organizing all of the shiny objects that they see, they end up spinning their wheels,” Route Cause co-founder Richard Bueckert said. “We’ve realized that the Route and Repeat Roadmap is very effective in getting entrepreneurs into organized and systematic action as opposed to chasing the flavour of the day, or that shiny object, or that some promised thing that is going to change your business.”

“Not only does the Route and Repeat Roadmap help you categorize things, you also start to see gaps where you don’t have anything happening in your marketing,” Bueckert said. “And those are, of course, the holes in the journey where people are falling out, and those are your greatest opportunities to go do something, even something small, that’s going to create immediate growth for your business, whether that’s in revenue, whether that’s in time savings, or whether that’s in peace of mind.”

Route Cause is actively introducing the Route and Repeat Roadmap to spray foam and coating business owners via webinars featuring Richard Bueckert.

Rolling out a Route and Repeat Roadmap plan can be done quickly and affordably with easy-to-use automation technology from Route Cause. Download this playbook and start planning now.

Collect leads

In the Route and Repeat Roadmap model, there are three phases of collecting leads: Target, Attract, and Capture.

Target:

Clearly define your target customers so you understand who they are, why they have pain, and where they go to find answers.

It's imperative that you clearly define your target customer. Investing in identifying accurate targeting within the right channels will help your business narrow down an audience for your niche market and use your advertising/marketing dollars more efficiently, ensuring you're catering to those who will benefit from your business the most.

The best way to define your audience is to create a customer avatar. Here's a great template you can download that will help you determine what your target audience looks like.

Here's how to create a customer avatar:

Start by asking the right questions around how your product or service will influence or improve the life of the avatar:

1. Where are they located?
2. How old are they?
3. To which generation do they belong?
4. What is their relationship status?
5. What is their highest level of education?
6. What is their job title?
7. How much money do they make in a year?
8. Do they own or rent?
9. What's the size of their family?

The next step is gauging the avatar's interests.

Third, identify the avatar's shopping behaviours.

The most effective client avatars are created with information based on market research as well as information that you gather from your current customer base.

Gathering the most accurate information possible to develop your business avatar can be accomplished by:

- Using surveys to capture feedback from your existing customers.
- Adding a Custom Audience Pixel to your website helps small businesses track and learn more about people who have visited.
- Interviewing customers to reveal their motivation behind certain buying behaviours.
- Creating a detailed profile of your ideal customer will yield the optimal ROI with sufficient data based on how they'll respond to the right product at the right time.

A customer avatar will also help you more effectively advertise to your target audience by knowing which social media platforms they use. You can leverage this information to target the right people on the right channel so you know how to create your content and come up with better product placement that will fulfill your customers' needs.

From Richard:

- "To succeed at collecting leads, you've got to be crystal clear about who you're after and what drives them. If you try to speak to everyone, you're really speaking to no one. It's just as important to know who you're NOT for. Your business isn't meant for everybody—it's built to solve a specific problem for a specific group. When you accept that, you can laser-focus on your sweet spot and not worry about the people who aren't a fit."
- "If you're not sure who your target person is, there are big, detailed ways to figure it out—like research—and there are simple ways. It's a spectrum. When in doubt, just try the simple approach: ask yourself who your best and favorite customer is. Maybe the one who pays you the most isn't your favorite, or the one you love working with isn't the highest-paying. Find that person who is both your best and your favorite. That's the customer you really want to do business with."

The goal is to find people you connect with who are open to building a mutually beneficial relationship. They should truly believe in what you do and you should truly believe in what they do. Ideally, they will amplify your business and accentuate your efforts.

People often put a lot of pressure on networking. "I must meet a new client or sign a new deal or it's not worth it!" When we take the "network" out of networking, though, you miss the value of it. As a service-based business, much of our work comes from referrals. The best way to make referrals is to meet people; get to know them, ask questions and be open.

Creativity is a powerful asset. That's worth repeating, and its truth must be embraced. But here is the difference between successful advertising companies and professionals: The most effective use of creativity today isn't in content development with its "faster, cheaper" mantra. It's in elevating creativity to allow it to influence our entire approach to advertising, including the business opportunities we pursue.

Without proper on-page optimization, your awesome content won't rank well in search engines like Google and, as a result, won't get the attention it deserves. In other words, you'll be missing out on the biggest source of free traffic (and leads): organic search results.

What you might not know is that you may have leads hiding among your social media followers. Your social media audience is likely the most engaged audience you have access to online, and knowing how to target your social media followers by their demographic data will allow you to find those leads and funnel them into your sales process.

Narrowly defining your target market is an integral part of successful marketing. This worksheet will help you define your ideal client, which will allow you to be more efficient (with your time as well as your finances) in marketing your product or service.

<https://bobregerus.com/facebook-advertising/the-customer-awareness-timeline/>

Attract:

Understanding the problems and motivations of your target customers allows you to launch enticement tools like high-value content that address your prospect's biggest pains/aspirations.

Knowing how to leverage lead magnets to attract prospects will give your small business a massive competitive edge. This is especially true when you understand the needs and motivations of your target audience, helping you create powerful lead magnets.

The first place you want to start is to ensure your website provides valuable content that will attract your target audience. Some great examples of robust content include:

- Webinars <https://home.webinarjam.com/index>

- Infographics <https://www.napkin.ai/>
- Podcasts
- Guides
- Virtual conferences/events
- Visual commerce
- White papers
- Ebooks
- Surveys/quizzes
- Product tutorials and demos
- Easy social media access/icons
- Fleshed out product descriptions with purchase links
- Blog posts demonstrating solid SEO
- Product videos
-

Entice your target audience to access your content, then collect their contact information with a submission form by programming an interstitial, or a pop-up, on your landing pages. If the content is gated with a form, the lead will fill out the form to access the enticing content, and their info will be added to your CRM so you can stay in contact with leads and nurture your relationship with them over time.

Some best practices to apply to your interstitials include:

- Gauging how many fields will be sufficient for initial data gathering. Fewer fields yield more participation. You don't want to intimidate your audience members with too many fields initially; 1-3 typically suffice for the first submission form.
- When asking them to sign up for a newsletter, only start out by collecting their email address.
- Exit interstitials can be more effective than entrance pop-ups, as they won't interrupt the customer's browsing experience and discourage them from spending more time on the site.

From Richard:

- "When you're figuring out how to attract people, it's all about mindset. You've got to step into your prospect's world and understand their problems better than anyone else out there. You also need to know what they really want—their hopes and aspirations. Then, shape everything you do around solving those problems or helping them reach those goals. In the end, growing your list and collecting leads is a value exchange. People won't just hand over their info unless you're giving them something worthwhile in return. That's why you should always ask yourself:

'What unique value can I offer to earn their trust and move our relationship forward?' When you think like that, you'll build a much stronger connection with your audience."

- "This mindset is huge. It's one of the main reasons our coating business kept growing. As entrepreneurs, our first instinct is to talk about our products and solutions. But our customers aren't focused on that—they're focused on their own problems. Once we start speaking to those problems that are on their minds, that's when we really open the door to build a true relationship."

For someone who's just starting an online business or making a website, SEO can be overwhelming without knowledge of the basics.

For every new page that you add to your website, you want to make sure it is optimized for search engines. That's because your audience may be searching for different things, and that landing page you just created is exactly what they need to find. By having an SEO checklist on hand when you develop that new webpage, you will be able to keep your SEO practices and results consistent, helping to draw more targeted traffic to every page of your site.

As a small business owner, now's the time to grab your audience's attention by generating an influential marketing strategy to get your content noticed and drive traffic to your site, whether it's in the form of a blog, photo essay, video, survey, etc. There are so many ideas out there that constitute great pieces of content.

High-quality video is right now one of the strongest, most empathetic and effective types of content. In fact, one-third of online activity is spent watching videos. On top of that, 73% of B2B marketers say that video positively affects ROI.

The popularity of video marketing offers both opportunities and challenges. Its success clearly shows customer demand, but also means that every other business will also be investing in video, making it harder for you to create great content that stands out. But, if you take your time, carefully choose the right type of video content, and understand how you'll promote it, you can make stellar videos that resonate with your customers (and stay within your budget!).

Capture:

Building bulletproof lead capture methods to collect contact information into one central place for later follow-up.

The final step in collecting leads involves carefully strategizing lead capture methods that will guarantee success. Collect contact information and organize it in one central place for later follow-up, such as Route Cause's client relationship management (CRM) system.

A CRM will help you be more efficient and impress your clients by leveraging a system that keeps all your business organized with one integration tool.

A CRM like RApp allows you to:

- Create landing pages with webforms so you can capture leads
- Automate messaging and data entry
- Book appointments
- Keep track of invoices and payments
- Help you view and manage your sales pipeline

The first step in lead capture is ensuring your website is relevant and offers value to the target audience. Think of your website as a "lead capture machine," converting prospects into solid customers by moving them through the sales funnel.

Your website's homepage is where you'll make your first impression. Make sure its terminology is relevant to your target audience and includes SEO keywords they're searching for. Google's free keyword tool, Wordstream, is a robust method for searching top keywords relevant to your industry and location.

You also want to make sure your business's contact information is accurate and easy to find on the site. Do a spot-check every so often to see if images and links are relevant and directing customers to the correct place.

If you're going to attract leads by enticing them with a special offer, make sure it's not open-ended. Make it as specific to your target audience as possible so the visitor knows exactly what they're getting and your business doesn't appear too impersonal. Ensure that your content is compelling enough to prompt your visitors to relinquish their contact information willingly and be excited about doing it, knowing they will get something great in return.

Learn how Route Cause can help you collect more leads and grow your business by checking out our product demo. Route Cause will help you organize all your customer information in one centralized place, making it accessible to your whole team. Never let another lead slip through the cracks again. Generate more leads, more clients and more growth than ever before.

From Richard:

- “My passion as a co-founder and CEO of Route Cause is helping foam and coating businesses grow. Here’s what I know: they grow by making sales, and sales happen by building relationships. You can’t build relationships if you aren’t adding new contacts to your database and staying in touch with them. After nearly 20 years running this business and seeing so many customer databases, I’ve noticed that the businesses adding new contacts all the time are the ones that grow. So my big piece of advice is to make sure you’re always adding contacts. That way, you have people to connect with and nurture into customers. If you don’t, it’s like trying to build something from nothing. And what really surprises me is how often entrepreneurs meet new people but don’t have a system in place to capture them as leads and start building those relationships.”
- “Check out all the different ways you’re interacting with potential customers, and make sure you have a solid intake process for each one. Imagine if you had a bulletproof system for handling leads from every place people connect with you. Then, if you and your team were methodically tracking all the key details, you’d always be on top of things and showing you genuinely care. Finally, if your list kept growing—neatly segmented so you could send the right message to the right group—how big of a game-changer would that be for your business? That’s really the main point here: putting these systems in place can have a massive impact.”
- “Segmentation is one of the most important parts of capturing contacts. A contact is just a person, but each person will connect with your business in a different way. That means you need the right way to communicate with them. This is why a tool like RApp is so powerful. It helps you have relevant conversations, send the right follow-up, and make offers that actually matter to each group. By targeting the right people with the right message, you’ll see a huge difference in your results.”

Lead generation isn’t a new way of bringing in new business. It’s been around for a while. But, changing trends and changing behaviours and interests across generations means you have to keep your ear to the ground to make sure your lead generation

strategy is on point and right for your business. Even if you have a strategy in place, it may not be as effective as it once was and needs to be reevaluated.

The leads you worked so hard to attract are now clicking around your website, thinking about whether or not they should become a client. And then, many of them vanish without a trace. If those website visitors don't turn into buyers, you may never know who they are, how to contact them, and what you could have done to follow up and earn their business. That's why it's important not only to attract leads but also to capture them—ideally, by using a lead magnet.

Ah, the lead generation form, you know the one, that interstitial that pops up on a website when you try to navigate away from the page. It's not there to inconvenience you, it's there for a very important reason—companies want to get to know you better by asking for information from you in exchange for the content they're providing.

Lead magnets are aptly named because they are exactly that— magnetic offers which attract leads to your business. You might offer an infographic, a form or template or an informational ebook. Whatever the form your lead magnet takes, consider the variety of methods available for using lead magnets to attract prospective leads.

Even though technology has made it incredibly easy to connect with people online, there is still a real world out there where people meet face-to-face and swap information via networking and business cards.

Convert Clients

In the Route and Repeat Roadmap model, there are three phases of converting clients: Engage, Offer, Close.

Engage:

Clearly define your target customer so you understand who they are, why they have pain, and where they go to find answers.

This is where you get to educate your buyers about your products and services. It's up to you to guide them properly so they look to you as a business they can trust. Instill the confidence in your customers that creates a monopoly in their minds so that they only associate the product or service they need with your business when it is time to engage.

Some indicators that they're ready to take action include:

- They visit pages on your website
- They interact with the content that you're distributing
- They open an email and read it
- They respond to emails
- They click links in emails
- They request a consultation
- They schedule appointments
- They call or text you, or actually respond to a form of outreach

You also want to practice lead nurturing, which involves listening to what potential customers need, providing valuable information and addressing their questions and concerns. Be an advocate for your customers, making it clear you're putting their needs first instead of just trying to make a profit.

Subtly educate and increase awareness of your product or service through informative emails and by providing access to valuable resources or tools such as product demos, how-to videos, white papers and ebooks.

Building credibility with your customer base is invaluable, as it will create a robust influence on the prospect who is still in the decision-making phase and will need information on a topic or product they're not familiar with yet. If your company can be

the one that provides that education, not only will it give you a competitive edge, your prospects will remember you and appreciate you for it. Your goal is always to be top of mind in your industry.

From Richard:

- “You want to build a ‘monopoly’ in the minds of leads who aren’t ready to buy yet, so that when they do decide to buy, you’re the only option they can imagine. Sure, you can’t legally create a real monopoly, but you can become the go-to choice in their heads. They’ll think, ‘Why would I go anywhere else? I already trust these people, and they have exactly what I need.’ That’s how I approach it.”
- “You want to set up a new lead play—that’s a series of steps, messages, and tools for following up. It might be an email sequence, a phone call, or even tagging someone on social media. Whatever you choose, it should connect with what they signed up for. That’s how you keep them interested and move them closer to doing business with you.”
- “When you put a message out there, you might have a bunch of people who are actually interested but just not saying anything yet. It’s easy to think, ‘Oh, they’re not interested.’ But in reality, they’re just busy, and their timing doesn’t match yours. Entrepreneurs often jump to the wrong conclusion and assume no interest. That’s why constant engagement and follow-up is so important—this is the sweet spot I’ve focused on for nearly 20 years. Over and over, I’ve seen that follow-up works. In fact, it’s the biggest difference between small business success and failure. If there’s one silver bullet, it’s follow-up.”

One of the most common mistakes small business owners make when it comes to automating their communication is not implementing a solid email nurture sequence; not everyone needs a long-term sequence, but if you want to create a sustainable long-term business, ensuring your leads and prospects keep you top-of-mind as they get closer and closer to saying “maybe” and then “yes” to your products or services, then this is an absolute must.

Email marketing routinely provides some of the best ROI for marketers, and has for as long as anyone can remember. In fact, 59% of marketers report that their email campaigns outperform all of their other digital marketing efforts in terms of ROI, so it’s no wonder that they are the mainstay of the industry.

Webinars have proven to be an effective way to generate quality leads for many marketers. In fact, a reported 60% of marketers use webinars as part of their content marketing programs. However, creating an effective webinar requires a lot more

planning and hard work than writing a blog or an article. For a webinar to be productive, marketers need to interact with the target audience beforehand and create buzz about it.

Sometimes, it's not about how you do it but when you do it that makes all the difference. One of the key considerations when making calls to business prospects is timing it when they are most likely to give you positive feedback and undivided attention.

Use these free follow-up email templates to save yourself time coming up with email messages whenever you're corresponding with prospective clients about scheduling a meeting and following up after a meeting.

Offer:

As leads engage, present offers that align to your clients' needs, and lead them to the most natural next step.

Depending on your industry and your prospects' behaviour during the engagement phase, it's important to get clarity on the most critical steps in your sales process and make sure they align with what your clients' needs are.

Once that has been established, it's time to present your offer. One common misconception about presenting an offer is that you're going to "ask them to buy." In the context of the Route and Repeat Roadmap, not all leads are created equal. In other words, it's imperative that you be mindful of where they are in your sales funnel as to which step they want to pursue next. You want to make an offer that's the next best thing for them by thinking about what the key milestones are in your sales process.

You're solving the prospect's problem so it's compelling from that standpoint, but you want to make it really exciting and enticing for them to do business with you. You have to do all the work leading up to this so leads know, like and trust you. If you make an offer and they don't trust you, it might come across as flat or generic. Don't overlook the importance of making a really compelling offer that makes it a no-brainer for your prospect to want to do business with you.

Start stacking value by adding offers beyond what the normal price would be. Make it more compelling by associating timelines or urgency/scarcity with the offer.

Supplement it with social proof where customers are attesting to the great value you've created for them with reviews, comments or testimonials. All of these things make it more compelling for your prospect to be emotionally engaged in what you're doing, which inspires them to take the next step.

Again, offers are not just to buy; you're selling to people and making offers to them along the way. What will it take to get them to:

- Subscribe to your list?
- Engage in your emails?
- Schedule a consultation?

Be clear that you're trying to build the value around why they should meet with you for a consultation.

Your offer presentation is the most important step of the sales cycle. In this phase, it is your job as the business owner to showcase your product or service in an informed, professional way that establishes you as the expert in your niche. What sets you apart from others in your industry? Why should your business be the one your prospects trusts going forward?

As your leads express more interest in your product or service, present an offer so compelling that it naturally leads them to the next step, which is closing the deal.

From Richard:

- "When a lead pops up and shows interest, you've got to make sure you don't drop the ball. If your funnel has cracks or gaps, those leads will slip right through. There are plenty of reasons why someone might pass on a quote, but having a solid system that adapts to each milestone is key. You need to know exactly where someone is in the process and what the next step will guide them closer to the sale. Just like you have a rock-solid lead collection system, you've also got to have a bulletproof hot lead tracking setup. That way, nobody falls through the cracks. At Route Cause, we've created software that's built around the Route and Repeat Roadmap to help with this. Of course, you don't have to use our platform—though we're pretty sure everyone should."
- "Sometimes our offers get a little bland, and we don't make them exciting enough for our buyers. That's where 'value stacking' comes in. You're not just solving their problem—you're also making it a killer deal they can get pumped about. That emotional spark makes your offer stronger. But you can't skip building that know-like-trust factor. If someone doesn't trust you yet, even the best offer can

feel like a pushy used car pitch. Once you've built a real relationship, though, the same offer will feel like a no-brainer. So don't overlook making your offer so good, they can't wait to say yes."

- "Yesterday I mentioned that your offer has six conversion variables. Here's what they actually are...
 - **Clarity of Promise.** Does your offer instantly communicate who it's for and what they get? Confusion kills conversions before price ever comes up.
 - **Strength of Outcome.** Vague results don't sell. Specific, measurable, desirable outcomes do. "Better marketing" doesn't convert. "Three more clients this month" does.
 - **Unique Mechanism.** Why is your solution different from everything else they've already tried? If you can't answer that clearly, neither can your buyer.
 - **Simplicity of the Plan.** The harder success feels, the less likely they buy. Most offers accidentally make the path to results sound like work.
 - **Perceived Value and Pricing.** Price isn't just a number. It's a signal. The wrong price (too high or too low) creates doubt before anyone reads your copy.
 - **Risk and Friction.** Guarantee, urgency, CTA clarity. The final layer standing between a hesitant reader and a buyer. Most offers get this last. It should come first.

Most offers have two or three of these quietly working against them. The problem is you can't see it from inside your own business, you're too close to the offer to diagnose it clearly."

Gaining a winning sales strategy is not a birthright, it is a skill. It's what salespeople do beyond selling that makes a difference in closing a deal. It's the fixed behaviours and established routines of a salesperson that lay the foundation of their successful work ethic and business strategy.

Just because someone joined your mailing list or took a quiz you created doesn't mean they will become a customer. You'll probably need to communicate with them a few more times to convince them that your product can solve their particular problem. Statistically, you want to push for five refusals before you give up on making the sale. And if you need to keep going until you get a "yes" or five "nos," well, that means you need to hone your sales follow-up technique.

For a small business, selling products online is an awesome way to drive sales and reach new audiences, but many businesses experience disappointing online sales. This

is because they mistakenly assume that selling stuff online is like selling stuff face-to-face, which simply isn't the case.

With so many e-commerce businesses appearing online, it's imperative that retailers offer unique online experiences for customers to ensure continued conversions. Shopping has never been easier, as one can just lie in bed with their phone and look through everything that ecommerce sites have to offer ... That being said, the competition among e-commerce businesses is fierce, making it more challenging for e-commerce sites to attract and retain customers.

A contract proposal is a written document sent by a business to persuade a potential client to choose that business. They can be solicited or unsolicited, as long as they pertain to the prospect's business and needs. While it may be advantageous to proactively submit a contract proposal to a prospect unsolicited, it has a higher chance of being ignored by the prospect. When a contract proposal is requested through an RFP, however, your prospect is actively looking for the kind of solution your business provides.

Close:

Streamline a simple process for clients to purchase from your business by implementing tactics that align with your sales cycle.

When it comes to closing a deal, reduce and eliminate friction in this process as much as possible. Closing the sale is more than a transaction. The close involves clear communication, good presence and written documentation. It's always valuable to provide your leads with a robust paper trail of your correspondence and payment history.

Streamline a simple purchase process for clients by implementing tactics that align with where they are in the sales cycle. Action is driven by emotion and belief—it's about identifying their needs and pushing solutions through in different ways to get them to move in the direction that is relevant to their customer journey.

When you're presenting a proposal, it should be an easy decision for leads to accept said offer because you've already built that trust and given them a reason to be excited. Keep it simple by sending them a link that includes a call-to-action (CTA) such as 'Click here to make payment.'

In your proposal, summarize your business's strengths by emphasizing how your product offering is different from and better than that of your competitors. Focus on the main objectives you and your client focused on throughout the sales process and demonstrate how your proposal meets their needs and solves their problems. Ensure it addresses the reason the lead signed up in the first place. This is your opportunity to shine as a valuable solution for your leads that will convert them into devoted brand ambassadors.

With automated tools such as Route Cause's CRM, you can collect more leads and convert clients in the most efficient way possible by:

- Setting up automated sequences to follow up with leads at the right times based on their actions.
- Sending offers at the right time in the lead journey through automation.
- Automating your sales process so you have a set cadence for how and when to follow up with leads in your pipeline.

From Richard:

- "When you follow up quickly, there's a five to ten times better chance you'll close the deal compared to waiting a few days. But we all get busy, we don't have a solid system, we rely on sticky notes, and then we skip responding to people. That's where speed to lead comes in. If someone texts you, are you getting back to them fast? You need a system to track this stuff. When it comes to closing, it's all about removing friction. Be super clear about the next steps. As someone moves through your funnel, they should hit zero bumps in the road. If you're sending them a proposal, make it easy for them to accept. If you're asking for payment, don't send a PDF and ask them to mail a check—those days are gone. Provide a simple link so they can pay right away. That's how you make it smooth sailing to the sale."

When starting a small business, entrepreneurs are worried about things like financing their venture, coming up with a marketing plan, hiring, operations, and other important tasks. Rarely do they stop and wonder, "How am I going to accept payments from my customers?" The list of payment options is expanding all the time. It's important to keep up with the times and meet customers where they are, both in terms of location (online or offline) and in terms of what payment options they're using from a technological standpoint.

If you want to sell more—offline and online—you’ve got to make it easy for your clients to buy from you. That might sound simpler than it is, but if you’re not hitting your sales goals, you may be unintentionally making it harder than necessary to buy.

Seamless small business invoicing, especially for new businesses, can be the difference between smooth business operations and having to resort to expensive loans, maxing out credit cards, and other sub-optimal financing options that make it easy for you to fall into increasing debt. If you’re a new small business owner, you might not recognize just how important the invoice itself is to getting paid. Here are 10 small business invoicing mistakes start-up owners make, and how to avoid them.

Create fans

In the Route and Repeat Roadmap model, there are three phases of creating fans: Deliver, Impress, Multiply.

Deliver:

Make sure you’ve systematized your delivery, so that clients consistently and automatically get what they were sold.

Once it has become apparent that you’ve accumulated some lifelong customers, you need to ensure you’ve systematized your method to deliver services so that clients consistently get everything they were promised.

When it comes to business relationships, sometimes it’s not always about the sale, but the interaction and the trust that is built between the customer and the agent/retailer/owner, etc. It’s also not just about the products, it’s about the education behind the products and services. Delivering education on how your business can change and improve your customers’ lives is just as valuable as the product or service itself.

Strive to become that advocate for your customers, be the company they can turn to when they’re looking for reliable customer service and quality products. Be the company they turn to when they have a huge problem that needs to be solved.

For example, before Route Cause, Hear and Play struggled with purchase order inaccuracies due to non-integrated ecommerce and email systems. It wasted a lot of its

valuable time fixing incorrect orders. With Route Cause's all-in-one platform, it consolidated its sales, marketing, and ecommerce tools, and started sending personalized messages based on behaviours and attributes. Its customer lifetime value grew by 300%, and repeat sales increased by 80%

From Richard:

- "Creating fans is all about giving your customers an amazing experience after they've already bought from you. Honestly, this is a huge deal. Too often, we get so caught up in trying to collect more leads that we forget about this part. We fulfill our orders, collect the final payment, and then move on. But there's real work to do here—work that can bring in more revenue. When we focus on creating fans, we keep people happy and they keep coming back."

While customer service is important, it's no longer just about customer service. Consumers have come to expect excellent service before they become a client and while they're a client. They pay attention to how you interact with them and the details that go into providing them with excellent service because they want to buy from people they feel like they can trust and develop a relationship with.

Regardless of the industry you're in, improving the customer experience is the key to increasing retention, satisfaction, and sales. The benefits of good customer service take many forms but the best is its impact on your bottom line.

The challenges of providing outstanding service are many. And as a small business owner, chances are it's overwhelming to keep track of and respond to client inquiries in a timely, accurate and delightful way. There is no shortage of tools out there to try and help you streamline and manage your client support workflow. That's a good thing. But it can be pretty difficult to know just where to turn and what will work best for you.

In many cases, automation is worth the investment, and it often brings more than just efficiency. It can also help you build better relationships with customers, improve your bottom line, and allow you to return to the more enjoyable parts of your job.

Impress:

Create intentional plans to go above and beyond with every client, consistently. Leave a mark that keeps them coming back for more.

This is your chance to go above and beyond for your customers. Not only will running your business through a CRM like Route Cause's help you maintain organization and efficiency, but it will make it easier for clients to work with you, keeping you reliable and approachable.

Some ways to improve the customer experience and really impress your clientele include:

1. Making subsequent interactions just as smooth as the first—keep your standards consistent so your customers know what to expect every time and can associate your brand with top-notch service.
2. Finding every possible solution—you're there to solve their problems, so it's important to become a master of troubleshooting. If one product isn't a good fit for the customer, try another. If nothing works, don't force the issue or make them feel pressured.
3. Eliminating unnecessary delays and poor communication habits –if someone calls your place of business and you know you're going to have to place them on hold, offer to call them back instead of making them feel neglected. If an item is going to be delayed, send a courtesy message to the customer letting them know and offer to waive the shipping fee.
4. Giving your customers a seamless experience—customers always want a hassle-free experience when doing business with you, make it as pleasant as possible while trying to fulfill their needs.
5. Letting your personality shine through—hold your entire team to a certain standard of customer service, even if you, as the business owner, are not there. Make it so no one ever has to ask to “speak to the manager” because something went wrong.

To give your business a competitive edge, you should always aim to do something unexpected beyond good customer service. If you're a realtor, surprise your clients on their one-year anniversary of living in their home with flowers and a card. Or record all of your customers' birthdays in your CRM and automate birthday emails to be sent out.

In the case of Burleson Orthodontics, they leveraged Route Cause's pre-set actions to initiate reminders for staff to send greeting cards with thoughtful gifts at key points in treatment. For example, after a patient has braces put on, they receive a gift card for a smoothie to help soothe any discomfort. And after braces are removed, the patient receives a gift card for a free caramel apple.

You can also implement loyalty programs for your most devoted customers to keep them coming back.

Loyal customers, also known as brand ambassadors, are spending money with your business regardless, so why not have a loyalty program in place? It can also impact the way they consume and how frequently.

It's also important to add incentives and upgrades throughout the duration of a customer's loyalty program to increase the likelihood that they will remain loyal to your brand. For example, if they've spent a certain amount or accumulated a specific level of points, upgrade them to gold status.

From Richard:

- "It costs about five times more to attract a new customer than it does to keep one you already have. That means your current customers are way more likely to buy from you again. You might've heard people say, 'They're buying YOU, not your product.' But here's the deal: they're actually buying both. Once someone has already bought from you, you don't have to sell yourself all over again. Most of us think of marketing as a way to get people in the door, but it's really something that should happen throughout the entire customer journey. That's why we call it the Route and Repeat Roadmap. After someone makes a purchase, keep marketing to them so they'll come back for more. And if you focus on improving onboarding, you'll hold onto those customers longer—boosting retention and recurring sales."

While good customer service is what helps mitigate issues with customers, resolve problems quickly, and keep patrons happy, amazing customer service gets customers returning to your business again and again. And it's only wow customer service that instills a feeling of loyalty and compels customers to refer their friends to you.

A recent study concluded that 72% of U.S. consumers are willing to spend 16% more to do business with companies that deliver excellent service. Couple that with the fact that it's anywhere from five to 25 times more expensive to acquire a new customer than it is to keep a current one, and it's plain to see just how lucrative it is for a business to make and keep happy customers. Nowhere is this more important than in service businesses where how you treat your customers is your business.

Good small businesses listen to the concerns, suggestions, and demands of their customers. But the best small businesses take that feedback and implement essential

changes to meet the needs of their customers. This is where customer surveys come in. Without a customer survey—one with clear, well-written questions—you won't know what your small business is lacking and what changes need to be made to better serve your customers.

The right Customer Relationship Management (CRM) software doesn't just nurture leads and track prospects—it can also help you resolve customer disputes before they cause damage. Small business owners know better than most that a customer dispute is more than a thorn in the side. Even when they're not serious, complaints can lead to bad online reviews and a lack of referrals, both of which can hurt your bottom line.

Customers nowadays tend to take the more impersonal route and leave negative comments or reviews on social media or sites such as Yelp or Google. Being equipped with a few strategies for how to handle angry customers will help you smooth things over very quickly. Moreover, you'll be better prepared to communicate with your angry customer and help them get what they need so they can possibly turn the experience into a positive review, which is a PR and marketing win.

Multiply:

Guarantee repeat business, positive reviews, and customer referrals by intentionally planning each into your customer journey.

Encourage referrals by creating incentives for customers and partners in an effort to grow your client base.

Set up a customer referral program in the following ways:

1. Know what type of referral you're looking for—there are different levels of referral systems, and gauge which one is most appropriate for your business:
 - a. Asking a customer for the contact information of someone who might be interested in doing business with you
 - b. Asking a customer who discusses your business with the potential referral and can attest if they're interested in learning more
 - c. Asking a customer to introduce you to the referral or arrange a meeting
2. Develop a system—either request a referral on an invoice or send a referral link in a confirmation email.
3. Time it right—figure out the best time to ask for a referral and make it part of your sales and customer service process.

4. Pick a reward for customers that matters—understand what motivates your customers to give you a referral, and then design your program to provide rewards addressing their motivation. Don't just send a generic gift card; make it personal. Leverage upsell or cross-sell items as rewards and incentives for referring a friend.
5. Create a referral landing page—make it simple for your customers to find where they can leave reviews, testimonials and referrals. Include a link to the landing page on the purchase confirmation or send it in a survey a few days after the product was delivered.
6. Bring the program to your customers' attention—your customers may not even be aware that this program exists. Direct them to it with a call-to-action in your next email campaign or add it to the main navigation bar on the homepage of your website.
7. Follow up in a timely fashion—build a timeline or set up alerts in your customer referral program so you know exactly when to follow up on a referral so a hot lead doesn't go cold.

Let the Route and Repeat Roadmap help you stand out from other businesses in your industry. Above all, you want your customers to be satisfied and enthusiastic about doing business with you every time they call, click on your website or walk into your store. They are your biggest cheerleaders; they are the ones who will ensure your business stays open for a long time.

With Route Cause's CRM, you can create processes for delivering great service that will amaze your customers. Leverage automation for upsells, repurchase reminders, and requests for reviews and referrals.

Route Cause also enables you to automate the process of sending surveys to customers after their purchase, as well as a request for a review or referral to highly satisfied customers.

From Richard:

- "When your customers love what you do and get great results, they'll talk. They'll tell their friends, their coworkers, everyone. Nielsen says over 92% of people trust peer reviews before they buy anything. That's massive. McKinsey & Company also found that half of all purchases are influenced by someone else's recommendation. This is the real deal. If you give folks an awesome onboarding and a top-notch customer experience, they'll share how much you care and how great your products or services are. Then they'll point their friends in your

direction. And here's the best part: these referrals don't cost you a thing. They're totally free leads. That's a huge boost for your business."

Whenever you gain new customers, you should focus your attention on nurturing that relationship to build customer retention and loyalty. Customer retention encompasses all the actions and efforts that go into earning repeat customers. It is different than customer acquisition or lead generation because you've already converted the customer. Your job now is to ensure that those existing customers continue to buy products or services from your business.

The most ideal and organic way to grow your business is by referral. Success in any industry can be attributed to "who you know" or "word of mouth." Once companies understand the motivation behind what constitutes a successful customer referral program, they can implement a solid incentive program that will encourage their customer base to spread the word sans hesitation.

As a business owner, happy customers are your secret weapon. Referral marketing is a low-cost (or even no-cost) way to get more business from your existing customers. Even getting more business from existing clients can help you sell your product or service, build trust with new leads, open doors to new opportunities, give you meaningful feedback, and point out areas of improvement.

When it comes to the validation of your business, positive customer reviews hold just as much substance as the revenue you're bringing in. They represent success, customer satisfaction and hopefully, longevity. The second best aspect of positive customer reviews? They're a built-in marketing tool.