GIRA
BUSINESS DEVELOPMENT

From Chaos to Cash Flow:

Marketing Operations That Turn Leads Into Revenue

Transform your lead management from chaotic to systematic with marketing operations that work 24/7. This is a framework to capture, track, and convert more leads without working harder.

ERICKA ARIAS BERTANI

THE $50K QUESTION:

What's Your Lead Leakage Costing You?

Self Assessment: Where's Your Ops Game Today?

How do you capture leads?
A) Random notes and DMs
B) A basic form/spreadsheet
C) A consistent system with required fields

How fast do you respond to new leads?
A) Within a day or two
B) Within a few hours
C) Within 1 hour (goal)

Do you collect complete contact info every time?
A) Rarely
B) Sometimes
C) Always

How do you track follow-ups?
A) Memory/sticky notes
B) Ad-hoc reminders
C) A clear sequence with dates

Can you see lead heat (hot/warm/cold) at a glance?
A) Not really
B) Rough idea
C) Yes, status is obvious

Do you know which marketing drives revenue?
A) No idea
B) Some hunches
C) Clear by source

Can you calculate ROI on marketing?
A) No
B) Rough estimate
C) Yes, monthly

Scoring

- Most A's: Chaos zone — start with capture basics.
- Mostly B's: Progress — standardize and automate.
- Mostly C's: Perform — double down on what's working.

Common Marketing Operations Mistakes That Kill Revenue

Mistake #1:
No Standard Process
Cost: 40% of leads never get follow-up
Fix: Same process every time, written down

Mistake #2:
Manual Everything
Cost: Inconsistent follow-up, missed opportunities
Fix: Automate routine communications

Mistake #3:
No Performance Tracking
Cost: Wasting money on ineffective marketing
Fix: Monthly review of what's working

Mistake #4:
Scattered Technology
Cost: Lost leads, duplicated work, confusion
Fix: One central system for everything

3-Step Marketing Operations Framework

CAPTURE

CONVERT

MEASURE

CAPTURE Operations

Never Miss a Lead Again

The Challenge:
Leads come from everywhere: website, social media, referrals, networking events, phone calls; but you handle each differently.

The Solution:
Standardized Lead Intake Process

Standard Operating Procedure for ALL Lead Sources:

1. Immediate Capture: Every lead gets the same information collected
2. Source Attribution: Always track where they came from
3. Automatic Routing: Leads flow to the same place every time
4. Speed to Contact: Standard response time (within 1 hour = 7x higher conversion)

Essential Information to Capture Every Time:

- Name, phone, email (primary contact info)
- Lead source (how they found you)
- Specific interest/need
- Timeline/urgency
- Initial conversation notes
- Next action required

How to Start:

- Work with what you have: Optimize your current system first
- Simple upgrade: Add Google Forms to feed into your existing process
- If you need something new: Free options include Google Sheets, HubSpot CRM, or Airtable

Consistency matters more than the specific tool

CONVERT Operations

Systematic Follow-Up That Works

The Challenge:

Inconsistent follow-up kills conversions. You follow up when you remember, but there's no system.

The Solution:

Automated Follow-Up Operations

The 5-Touch Conversion Sequence (Runs Automatically):

#1 - Immediate (0-1 hour): Welcome + promised information

#2 - Value (Day 3): Helpful resource related to their need

#3 - Social Proof (Week 1): Success story from similar client

#4 - Check-in (Week 2): "How's it going?" + another resource

#5 - Soft Close (Month 1): Consultation or service offer

How to Start

- Email Templates: Pre-written for each touch point
- Follow-up System: Automation if your tools allow it, calendar reminders if not
- Task Management: Whatever system you currently use for reminders
- Performance Tracking: Simple spreadsheet or existing CRM reports

MEASURE Operations

Revenue-Focused Performance Management

The Challenge:

You're doing marketing & lead generation initiatives but don't know which ones actually make you money.

The Solution:
Marketing Operations Dashboard

Essential Metrics to Track Monthly:

- **Lead Volume:** How many leads from each source
- **Lead Quality:** Conversion rate by source
- **Revenue Attribution:** Which marketing activities generated actual sales
- **Cost Per Lead:** What you're spending to get each lead
- **Sales Cycle Length:** How long from lead to customer

Sample Monthly Review Process:

Week 1: Analyze lead sources - double down on what's working
Week 2: Review conversion rates - improve weak points
Week 3: Calculate ROI - eliminate activities that don't pay
Week 4: Plan next month based on data

What Gets Measured Gets Managed

Marketing Operations by Business Type

Service-Based Businesses

(Coaches, Consultants, Spa Owners)

Lead Sources: Referrals, website, social media, networking
Key Operations: Fast response time, consultation booking system, service menu clarity automation
Priority: Consultation reminders, follow-up after service, review requests

Real Estate Professionals

Lead Sources: Zillow, website, referrals, open houses, social media
Key Operations: Market area tracking, price range qualification, showing coordination automation
Priority: Market updates, new listing alerts, transaction milestone communication

Product/E-commerce Businesses

Lead Sources: Website, social media, marketplace listings, referrals
Key Operations: Inventory tracking, shipping coordination, customer service workflow automation
Priority: Order confirmations, shipping updates, reorder campaigns

Professional Services

(Accountants, Lawyers, etc.)

Lead Sources: Referrals, website, professional networks, content marketing
Key Operations: Qualification process, consultation scheduling, document collection automation
Priority: Appointment reminders, document requests, seasonal service offers

When to Get Professional Marketing Operations Help

Signs You're Ready to Grow

- Generating 10+ leads per month consistently
- Converting 20%+ of leads to customers
- Clear understanding of your best lead sources
- Basic systems working but need optimization

Red Flags You Need Expert Help:

- Spending 15+ hours per week on lead management
- Conversion rate below 10%
- Can't track marketing ROI
- Leads falling through cracks regularly
- Team members confused about processes

Professional Marketing Operations Services:

- System Audit & Design: Analyze current state, design optimal workflow
- CRM Setup & Integration: Full system implementation and team training
- Automation Development: Advanced email sequences and task automation
- Performance Analytics: Dashboard creation and monthly optimization
- Team Training: SOPs development and staff training programs

Marketing Operations Templates & Tools

Lead Capture SOP Template
When Any Lead Comes In (Phone, Email, In-Person):

01 Record lead information immediately (whatever system you use)

02 Capture essentials: Name, Phone, Email, Source, Interest, Timeline

03 Send immediate acknowledgment (within 1 hour)

04 Set reminder for 3-day follow-up (calendar, phone alarm, sticky note)

05 Update lead status/notes in your tracking system

Marketing Operations Templates & Tools

CRM Jump-Start
Basics to get you started

Working with Your Current System

- **If you use spreadsheets:** Add columns for lead source, status, next action, follow-up date
- **If you have a CRM:** Optimize fields to capture essential information consistently
- **If you use phone/paper:** Create a simple form template to fill out each time
- **If you have nothing:** Start with a basic Google Sheet or phone notes app

CRM Setup Template
Essential Contact Fields:

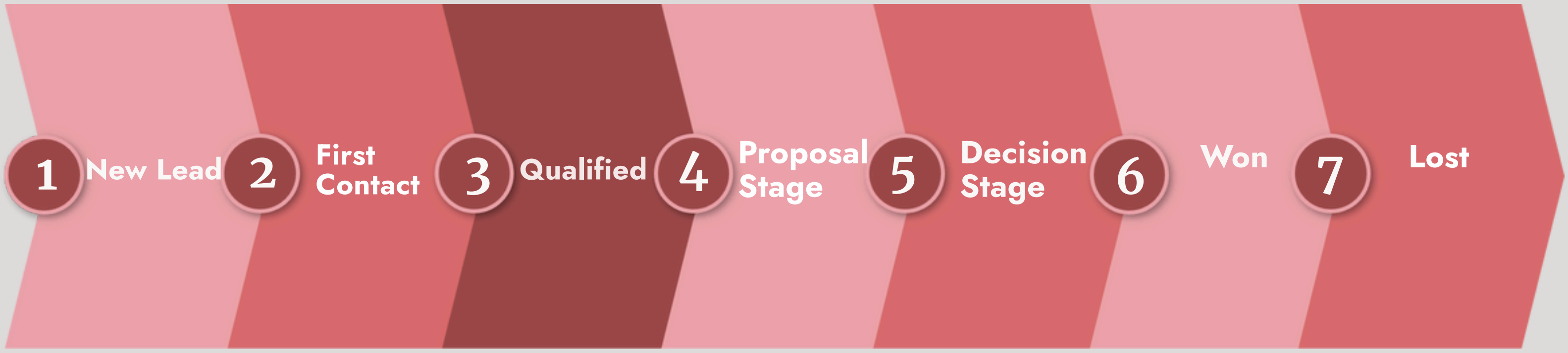
- First Name, Last Name
- Primary Phone, Email
- Company/Business (if applicable)
- Lead Source (dropdown: Referral, Website, Social Media, Networking, Other)
- Services Interested In
- Timeline (dropdown: Immediate, 1-3 months, 3-6 months, Just exploring)
- Budget Range (if applicable)
- Lead Status (dropdown: New, Contacted, Qualified, Proposal Sent, Closed Won, Closed Lost)
- Next Action Required
- Last Contact Date
- Next Follow-up Date

Same process every time, regardless of the tool

Marketing Operations Templates & Tools

CRM Jump-Start
Basics to get you started

Sample Pipeline Stages:



- New Lead - Just captured, needs immediate response
- First Contact - Initial response sent, waiting for reply
- Qualified - Had conversation, confirmed fit and interest
- Proposal Stage - Discussing specifics, pricing, timeline
- Decision Stage - Proposal sent, following up for decision
- Won - Became a customer
- Lost - Did not convert (track reason why)

Marketing Operations Templates & Tools

Email Automation Templates

Immediate Response

Subject: Thanks for your interest, [Name]!

Hi [Name],

Thank you for inquiring about [specific service]. I received your message and wanted to respond right away.

[If they requested information]: I've attached [resource] as requested.

Based on what you shared, I think I can definitely help with [their specific need].

What's the best way to continue our conversation? I have availability:
- [Time slot 1]
- [Time slot 2]
- Or call/text me at [phone number]

Looking forward to helping you achieve [their goal]!

[Your name]

Day 3 Value Add

Subject: One quick tip for [their situation]

Hi [Name],

I was thinking about your [specific challenge/goal]. Here's something that might help immediately:

[ONE specific, actionable tip - 2-3 sentences]

How is this landing for you? Any questions?

[Your name]

Week 1 Social Proof

Subject: How [Similar Client] solved [similar challenge]

Hi [Name],

I recently worked with [similar client type] who had a similar situation to yours.

Here's what worked for them: [brief 2-3 sentence success story]

Would this approach work for your situation? I'd love to discuss how to customize this for you.

[Your name]

Marketing Operations Templates & Tools

Performance Tracking

Monthly Scorecard Template

Month: ___________

Get a Digital Version

LEAD GENERATION:	
Total Leads:	___
Website Leads:	___
Referral Leads:	___
Social Media Leads:	___
	___
CONVERSION:	
Consultations Booked:	___
Proposals Sent:	___
New Customers:	___
Conversion Rate:	___%
REVENUE:	
New Customer Revenue:	$___
Average Sale:	$___
Revenue Per Lead:	$___
TOP PERFORMING:	
Best Lead Source:	___
Most Effective Follow-up:	___
Shortest Sales Cycle:	___ days

Marketing Operations Templates & Tools

Performance Tracking

How to Use Your Monthly Scorecard

Fill it out at the beginning of each month by reviewing last month's data:

1. **Count your leads by source:** Look at your tracking system and tally how many leads came from each source. This tells you where to invest more time/money.
2. **Calculate your conversion rate:** Divide new customers by total leads, multiply by 100. Industry average is 20-30%. If you're below 20%, your follow-up system needs work. Above 40%? You're doing great!
3. **Track revenue by source:** Match each sale back to where that lead originally came from. This is THE most important metric—it tells you which marketing activities actually make you money.
4. **Identify your "winners":** Which lead source has the highest conversion rate? Which follow-up email gets the most responses? Which leads close fastest? Do MORE of these things.

Use this data for your monthly review:

- Week 1 of the month: Review last month's scorecard. What worked? What didn't?
- Week 2: Adjust your marketing focus based on what's working
- Week 3: Check progress mid-month—are you on track?
- Week 4: Plan next month's strategy based on data

Pro Tip: Set a recurring calendar event for the first Monday of every month titled "Monthly Marketing Review" and spend 30 minutes filling this out. This one habit will transform your business.

Suggested Tools

GIRA
BUSINESS DEVELOPMENT

Need Help?

Ericka Arias-Bertani

Phone Number :

305-791-6405

Email :

Ericka@girabizdev.com

Book a call with me.