



THE TRUST EQUATION

CAMPAIGN PLAYBOOK & CHECKLIST

The Automated Client Attraction System To Get More Leads, Opportunities, & Clients





What To Expect

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Who's Behind The Trust Equation?

Josh Turner is a Wall Street Journal best-selling author, as well as Founder and CEO of both LinkedSelling and Connect 365. Considered the leading expert in the world for growing your business using LinkedIn & email, Josh developed & refined the relationship-focused lead generation system LinkedSelling now implements for their clients. Keep reading to learn how the same system works for your business too...



Why Does This Document Exist?

We believe that small businesses, marketers, and sales professionals deserve better. We needed an automation system to build relationships with potential customers, clients, and strategic partners without requiring either a degree from MIT to implement or a massive budget. So we created it. And this document is our playbook.

“

Remember...

"ABOVE ALL, SUCCESS IN BUSINESS REQUIRES TWO THINGS: A WINNING COMPETITIVE STRATEGY, AND SUPERB ORGANIZATIONAL EXECUTION. DISTRUST IS THE ENEMY OF BOTH. I SUBMIT THAT WHILE HIGH TRUST WON'T NECESSARILY RESCUE A POOR STRATEGY, *LOW TRUST WILL ALMOST ALWAYS DERAIL A GOOD ONE.*"

- STEVEN COVEY, AUTHOR, ENTREPRENEUR, & KEYNOTE

”



Section One

Intro

WHY THIS IS SO IMPORTANT.



Let's Dive In...

Marketing has changed dramatically over the last couple of years.

The landscape in the online world has shifted.

Trust in our society is at an all-time low. Just take a look at consumer trust in companies, and the marketing & advertising they spew forth. Facebook, Google, you name it. These companies are not trusted. And I haven't even gotten to our politicians yet!

It's never been as bad as it is today. People have their guard up. And that means your prospects - the very people you're trying to do business with - are less trusting of you now than at any time in the past.

For example, ever wondered why you get such low response you from your emails? This is your answer.

And yet... studies show
that prospects still prefer
to be contacted by
businesses through email.

(Don't believe us? Keep reading)

Here's the Proof...



86%

OF BUSINESS PROFESSIONALS

Prefer to use email when communicating for business purposes.

Hubspot 2020



760%

RISE IN REVENUE

From email campaigns that are segmented and customized for B2B businesses.

Campaign Monitor 2018



40x

MORE EFFECTIVE

At landing new customers than Facebook and Twitter combined.

Saleshacker

Even If Email Is Unsolicited...

78%

OF DECISION MAKERS

Say that an unsolicited email has led to a face-to-face meeting, phone call, or event attendance at some point

ITSMA 2018

92%

OF DECISION MAKERS

Give unsolicited email attention, even email from a company with no prior ties to them.

ITSMA 2018

59%

OF RESPONDENTS

Say marketing emails influence their purchase decisions

Hubspot Email Marketing Benchmarks

But...

Because there has been a massive shift in the marketplace...

Email automation has led to laziness. It's led to a lack of relationship-building. It's destroyed trust. People hide behind technology and your prospects aren't interested.

There is a better way.

Inside this Playbooks & Checklist document, you'll discover the strategy and the action items that will help you take advantage of the opportunity to create trust rather than destroy it.

- It gets you more leads, and more clients.
- It helps you automate your marketing.
- It will help you set up an automated sales followup process.
- And it's going to help you automate your long-term drip marketing as well.

This is just the beginning. Keep reading to see what else it helps you with...



WE HAVE TEMPLATES FOR...

SALES FOLLOW UP & LEAD GEN

- Get sales appointments from cold prospects
- Nurture existing leads so that they take your desired next action
- Follow up with HOT leads currently in your sales pipeline

STRATEGIC PARTNERSHIPS

- Get more joint venture (JV) & referral partners
- Tactfully stay in touch with your network
- Get insight and data from your best prospects

BRAND AWARENESS

- Be featured on podcasts and magazines
- Win stages & speaking gigs
- Pique the interest of influencers so they'll refer you to their audiences
- Get your guest posts featured on industry blogs

PROFIT MAXIMIZATION

- Get more upsells from your existing clients
- Follow up with clients about billing and receivables
- Get new clients for your online courses or coaching programs

AND A WHOLE LOT MORE!



A New Paradigm

Let's not mince words about it. This system is revolutionary.

Finally, you can combine *personal marketing* with the efficiencies of technology. You can communicate with your prospects so it feels totally 1-on-1 to them - and so it actually builds trust, but little do they know that you can automate it.

This is how you can communicate with hundreds or thousands of your prospects, without you having to spend hardly any time at all.

The tools you use make a difference. The one tool we recommend, has been custom developed just for this system, and there is no other tool like it.

It's called Connect 365.

To say that it's revolutionary would be 100% accurate, but without the strategy behind the software, you'll miss out on the revolution.



IT'S GO TIME. HERE'S A SHORTCUT...

In the following pages you'll see in action, the strategy behind 13 of our top playbooks. These are by no means the only campaigns you can implement with Connect 365.

They are just the beginning.

As a Connect 365 user you'll have access to dozens more templates.

Enjoy!



Section Two

The Campaigns

OUR TOP 13 PLAYBOOKS FOR BUILDING
TRUST, BOOKING SALES APPOINTMENTS,
AND GETTING HIGH-PAYING CLIENTS

Expert Content Campaign

Short Term Lead Generation

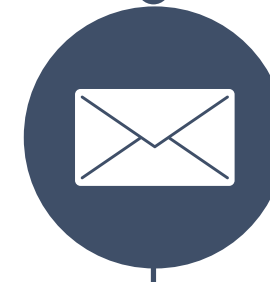
Perfect for: Anyone. Whether you have unique content or you are simply sharing curated content applicable to your prospects' interests, this is one of **our most recommended short-term lead generation campaigns**.

Outcome: Book appointments or meetings with either cold (or warmer prospects).

How to Build Trust in Your Messaging: Don't lose sight of your prospect. What do you know about your prospects that unites them? How can you fit that into your messaging? Don't forget that you need to provide value. Achieve that via your content choices in Messages 1 and 2 and include the reason they should want to speak with you in Messages 3 and 4.



Share the Link -> This first message is meant to provide value. The message should be short and sweet. Very small sentences and paragraphs. Important: the content you link to should be relevant first and foremost to helping your prospects, Keep it relevant to their interests.



Follow-Up on Content -> Keep the emphasis on the content and its benefits. You can begin to tie that content into why the prospect would want to speak with you. But lead with the content and why or how it can help them.



Can we connect soon? -> Create a unique reason why this specific prospect would be interested in speaking with you. What do you know about this prospect and how can you tie that into something you can provide help with? Keep it short. But give a compelling reason to chat.



Re: Can we connect soon? -> Follow-up. Make your question/ask very easy. Don't ask too many questions. Keep it focused so there is just one simple response the recipient can make.

Want the **full scripts** to use AND access to the tool that **automates the entire campaign?**



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Group Invite Campaign

Short Term Lead Generation

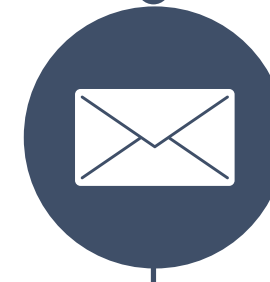
Perfect for: Anyone. Whether you manage your own group (on LinkedIn, Facebook or elsewhere) or you are simply sharing information on a third-party group that is applicable to your prospects' interests.

Outcome: Book appointments or meetings with either cold (or warmer prospects).

How to Build Trust in Your Messaging: Don't lose sight of your prospect - they want to feel like a valued VIP. Make it very clear that the group you're inviting them to join is for people just like them. Emphasize why being a member of that community is relevant to them and most importantly HOW it adds value to their lives and their business.



Intro -> Pick a group that has a clear name or subtitle that immediately denotes why this community is relevant for your prospects. Make it clear what's in it for THEM. (Keep it very benefits oriented).



Follow-up -> Highlight a specific discussion in that group. This should give good insight into the conversations or content or ideas that are being shared in this community.



Content Add (Value) -> Create a unique reason why this specific prospect would be interested in speaking with you. What do you know about this prospect and how can you tie that into something you provide help with? Keep it short. But give a compelling reason to chat.



Re: Reaching Out... -> Follow-up. Make your question/ask very easy. Don't ask too many questions. Keep it focused on just one simple response the recipient can make.

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Direct Lead Gen & Outreach Campaign

Short Term Lead Generation

Perfect for: Those targeting warmer prospects. B2B companies can target colder audiences with this campaign, but this direct approach is typically best reserved for warmer contacts. (We aim for more of a relationship-building campaign first for colder contacts.)

Outcome: Book appointments or meetings.

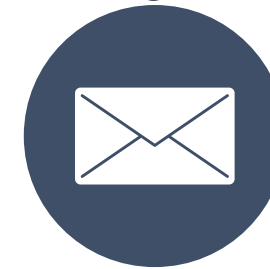
How to Build Trust in Your Messaging: Tie your message into how you've delivered results for others like them. Call out the common denominator between the prospects in your campaigns. I.e. If they are all CEOs of SaaS companies, you'd want to reference previous clients or experience in that space. OR if you are targeting people that are looking for Keto meal plans or other weight loss programs - make it clear that you've helped others just like them. Show that you know the unique problems they are trying to solve.



"Your website had me thinking" -> Introduce your big benefit and relate it to how your service/product has helped clients similar to your prospect. Offer a short phone call to share what worked for their peers.



Follow-up -> Short follow-up message. Relay your experience of working with other people or businesses in the same position as them.



Haven't heard back yet -> Reference the lack of response to your previous messages. Then offer a resource or some relevant content to help them figure out your key benefit themselves. This could be a case study or an eBook of some sort.

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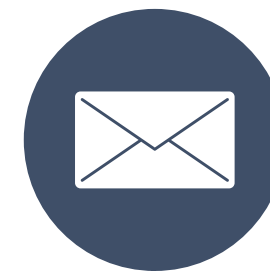
Referral Generation Playbook

Short & Long Term Results

Perfect for: Those looking to pick up more referrals from their current clients or audience. Great for Realtors, Financial Advisers, Insurance Agents, Coaches, and Consultants. Ultimately, this is effective for any company that provides outstanding services, products or solutions.

Outcome: Get introduced to more potential clients.

How to Build Trust in Your Messaging: Segment the lists of contacts you reach out to by their relationship with your company. You'll want to approach current or previous clients differently than you would approach people who have simply signed up for your newsletter. Be honest in why you are reaching out. Finally, look to provide a benefit to the recipient as well.



Do you know anyone looking to... [INSERT RESULT YOU PROVIDE] -> Let them know they are an appreciated customer/client first. Don't solely focus on your service...but on the type of client you are looking for (i.e. any other tech startups looking to get more on their AdWords spend?) Reference any referral fees or discounts you offer.



Checking back in -> Short follow-up message to the above.



Thought this may help -> Ask client if anyone has ever asked them about how they are doing so well with (INSERT YOUR AREA OF FOCUS)...and then provide them your branded content - a webinar or resource from your site - that they can give to any referrals. This is meant to give a lower stakes ask to your client. They don't have to feel like they are just sending their friends into a sales conversation.

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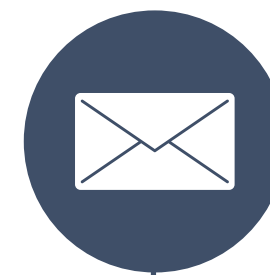
Affiliate Outreach & Recruiting

Long Term Play With HUGE Payoff

Perfect for: Businesses looking to attract new affiliates or Joint-Venture partners. Great for Info-marketers, Coaches, Consultants, Authors, Experts, Network Marketers, Agencies, Consumer brands, and Health & Wellness, and more.

Outcome: Convince partners to book a meeting to discuss mutually beneficial promotional or strategic partnership opportunities. Or to sign up to be a partner on your partner site if you are experienced in this area.

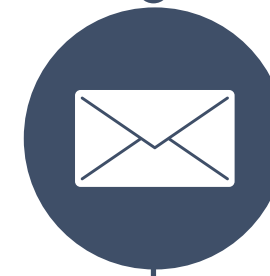
How to Build Trust in Your Messaging: Don't only focus on the facts and figures. Tease why your product or solution can help their audience and even make them a more valuable resource to their tribe. While you don't want to only focus on the facts and figures, you do need to tease the financial sense your offer makes to these prospects. The logical argument in your message should be how what you offer ties in with their expertise. The money argument in your message should be what they can achieve (as well as what other partners have achieved by working with you).



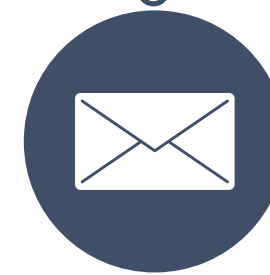
Intro -> Introduce your idea about potentially partnering. Focus on what you can provide them. Once they believe you can help them, they will be much more likely to offer to help you.



Re: Intro -> Quick follow-up - are you free next week?



(alternate) -> We'd like to feature you -> Offer a feature on a blog in your site, your podcast, your marketing materials, group, etc. Save your ask (about partnership opportunities) for when the conversation gets started.



(alternate) -> Re: We'd like to feature you -> short follow-up.

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Long Term Prospect Nurture Campaign

Perfect for: Everyone. Having a consistent sequence that keeps your name in front of your prospects will aid you in any type of sales or relationship-building campaign. Note: This campaign is intended as a once-per-month messaging campaign. You may pick and choose the messages by what is most relevant to your audience OR by what material or content you have available.

Outcome: Achieve top of mind status with your prospects. This leads to more sales or business growth opportunities.

How to Build Trust in Your Messaging: Keep your messages short and sweet. Write them in a way that makes it feel like what you are providing is new or recent. As always, the more you can make your examples relate specifically to the types of people you are contacting, the more successful you will be in generating responses.



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access to the tool that **automates the**
entire campaign?

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Thought Leadership Blitz

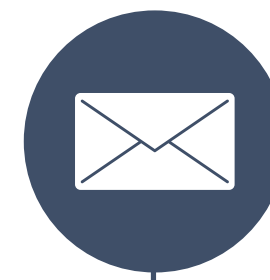
Long Term Play With HUGE Payoff

Perfect for: People or companies looking to get featured on more guest blogs or podcasts. Also great for B2C companies looking to reach a large audience.

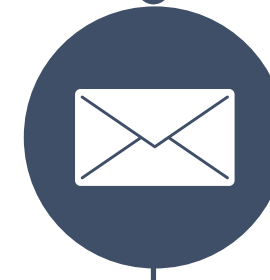
Outcome: This campaign will put you in front of many potential consumers at once. It will also help businesses looking to build up more credibility and thought leadership.

How to Build Trust in Your Messaging: Provide examples that position you as an expert. Provide reasons why you have a different point of view. Mention the amount of interest that their audience is likely to have on that subject. Ultimately, their audience wants GOOD content that their audience will READ...

Ideally something that doesn't add time or work to their plate. Show them how you can check those boxes.



An Opportunity -> Introduce your experience and why you are an expert. Provide examples of previous work as a reference of what you bring to the table. Tease what type of content you can provide.



Follow-up -> Short follow-up message.



Looking at your site -> Give specific examples of the type of content and expert advice you can provide them for the benefit of their audience. Ask if they'd be interested in you sending over short proposal or pitch.



Follow-up on interest in pitch -> This is short message asking if they'd be interested in you submitting some ideas. Add this: "P.S. If you're not the appropriate person for this discussion, please let me know who I should reach out to."

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Event Promo Playbook

Long Term Play With HUGE Payoff

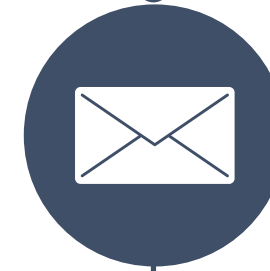
Perfect for: Event hosts or companies looking to get in front of an audience of prospects.

Outcome: Fill seats at your events, sell tickets, and improve show-up numbers.

How to Build Trust in Your Messaging: Make it feel intimate to the prospect if you can, by offering a quick chat about what's on the agenda and who will be in attendance. If your audience is familiar with your company but hasn't spoken or worked with you one-on-one, highlight that in your message as a key component of the event.



Can we connect soon? -> Introduce yourself and the event in a few short sentences. If you are selling tickets, create the opportunity to set up a short call or chat to discuss what they'll get out of the event and the types of people going.



Re: Can we connect soon? -> Short follow-up message - add urgency. "Only a few spots left," "finalizing the guest list this week...," "free tickets will be gone by end of the week at this pace," etc.



Last chance -> Give one more opportunity and highlight one key reason they'd want to attend and/or what they'll accomplish at the event

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The Speaker's Guide To Booking More Stages

Long Term Play With HUGE Payoff

Perfect for: Experts, speakers, entrepreneurs and those trying to expand their reach and get speaking gigs.

Outcome: Land guest speaking opportunities at conferences, local groups, retreats, and other live events (or online summits/webinars).

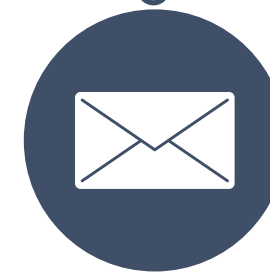
How to Build Trust in Your Messaging: Build rapport first and lead with what made you interested in their specific event or group. How can you help them provide a better experience for their members? Give them these details.



Kudos on what you've built -> Reference your familiarity with their event, business, or operation and that you help a similar audience.



Checking back in -> Short follow-up message about what you'd like to speak to their audience about.



Who should I contact? -> Give them a chance to refer you to someone else in their organization (as a warm referral) OR explain that this is their final chance to discuss what you can provide.

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The Sales Follow-Up Email Playbook

Perfect for: Anybody that sells in-person, over-the-phone or through online funnels.

Outcome: Close more sales with the leads you have - the ones you've either already had at least one sales call with, OR the leads that have engaged within your funnels.

How to Build Trust in Your Messaging: Don't let the opportunity end with the sales call. Thank them for their time. Provide a final view of what life looks like as a client of yours, and move them into the next step (either long-term nurture OR downsell).



Great getting to speak with you -> Thank them and provide an opportunity to stay in touch.



Client Case Study -> Share a customer success story and if you have it, a link to a case study



This made me think of you -> Offer a downsell opportunity. If you haven't pitched them yet on a lower-price or introductory offer, provide some detail and if needed, set up a call to discuss. Otherwise, enter them into a long-term nurture campaign.

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The Social Media Boomerang Plan

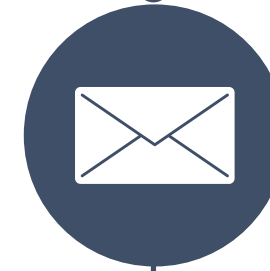
Perfect for: People trying to follow-up with leads they've contacted previously on social media.

Outcome: Generate more appointments and meetings.

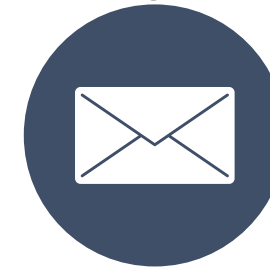
How to Build Trust in Your Messaging: Refer to your shared connection on LinkedIn (or other social media). Keep the messages short and offer them something unique and of value for why they'd want to speak with you.



We've been crossing paths -> Reference previous contact through specific social media and offer a call.



Re: We've been crossing paths -> Short follow-up message offering the call.



What's the Best Next Step? -> Give them a chance to tell you what they'd like to do next. If they don't respond, or they respond 'Not now,' add them to the long-term nurture sequence referenced in this document.

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Re-Engagement Campaign for Previous Contacts

Perfect for: Those with a previous list looking to restart their relationship. This could be contacts from a variety of sources.

Outcome: Generate more appointments and meetings.

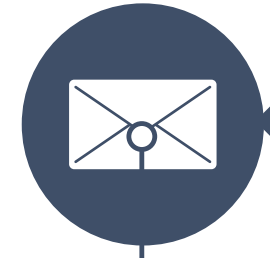
How to Build Trust in Your Messaging: Offer something new or different. Provide coaching and advice rather than just another call to discuss what you sell.



It's been awhile -> Your name came across my feed the other day and I thought it was worth reaching out about something new we're doing as a test... Are you still interested in [ENTER AREA OF FOCUS]?



Something new we're trying -> We spoke awhile back and we've made some recent changes... Position the call offer as a coaching session on a specific topic you can coach them through in 20-30 minutes. Tie it into your main offer.



Re: Something new we're trying -> Short follow-up.



Case Study share -> Let them know how someone or a business similar to theirs achieved the goal they likely have. Or how it solved a problem similar to theirs. Soft offer for call.



Next Steps -> If they don't respond or they respond with 'Not now,' add them to the long-term nurture sequence referenced in this document.

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Webinar Promo Blitz Campaign

Perfect for: People with a webinar or online workshop. Coaches, consultants, course creators, or anyone that sells through webinars.

Outcome: Get more registrants to your webinar. Or test a new webinar content before promoting it to a colder audience.

How to Build Trust in Your Messaging: Keep the language conversational and give it a feeling of novelty. Avoid sounding like you run it often or that it's automated. Make them feel like they have access to a special session.



I saved a seat for you -> Intro the webinar and that you are running it as a new market test and give them a link to register.



Anything you'd like me to cover? -> We go live in X days... I want to make it impactful for you, so first save your spot here and then tell me what question(s) you have about [INSERT WEBINAR TOPIC].



3 more days -> Short follow-up, I'm putting the final touches on the webinar.



It starts tomorrow -> Last call to get your spot. Show them the outcome of what they can achieve if they join the call. Keep the emphasis on how this leads to their ultimate goal (do not make the mistake of just referencing the service you provide).



One last chance -> Example: I had a lot of people say they weren't able to join at that time... Since these are pretty heavily interactive, we decided to do an encore next week.

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Section Three

Getting Started Checklist

EVERYTHING YOU NEED TO IMPLEMENT
THE TRUST EQUATION IN YOUR BUSINESS

EVERYTHING YOU NEED TO GET STARTED

THE BASICS

- ☒ **An Email Address**
Check! Since you are reading this, it's safe to say you have one.
- ☒ **An Email Signature**
Updated name and contact info at the bottom of your email.
- ☒ **A Business or Business Idea**
If you don't have one of these, you sure spent a lot of time reading through business growth content for nothing!
- ☒ **A Product or Service to Sell**
Check! Otherwise, why are you trying to connect with potential clients?
- ☒ **An Internet Connection**
Since you are reading this it's safe to say you have one.
- ☒ **A Phone Or Video Conferencing Tool**
You've got the ability to take calls, sales appointments, and meetings with your prospects and potential partners.

THE NEXT LEVEL

- ☐ **A Connect 365 Account**
Automate all of your outreach & follow up with Connect 365. [Create your free account here.](#)
- ☐ **Proven Email Scripts**
Get dozens of campaign templates that you can quickly edit and deploy inside of Connect 365
- ☐ **Expert Guidance & Feedback**
With Connect 365, you'll get live email support and TWO mastermind programs to get help & feedback.
- ☐ **A List Of Contacts to Message**
No list? No problem. With Connect 365, you'll get training and 100 free prospects from GetProspects!
- ☐ **A Few Hours (At Most)**
For initial setup, editing templates, uploading contacts, hitting send on your first campaign, etc.
- ☐ **A Winner's Attitude**
Only you know if this box should be checked. But it's the most important one. Everything else is included and we will provide support every step of the way.



Section Four

The Big Picture

WHAT SETS WINNERS APART FROM
EVERYONE ELSE...

How To Stand Out

If you want your email to stand out, get opened and get responded to there are three keys to personalization:

PRIORITY DELIVERY

Don't rely on 3rd-party email servers to target your smaller lists OR segments of your email. Deliver your emails to look and get delivered through your main account.

AUTHENTIC MESSAGING

Choose a messaging style and tone that feels unique to your prospects. Reference why you're reaching out, provide examples of other clients like them, keep your copy short, and put an emphasis on adding value to your recipients.

FREQUENT FOLLOW UP

Sales are won and lost in the follow-up. Don't rely on just one message or one campaign. You need to maintain consistent top-of-mind status and build relationships with your audience.



THE 3 KEYS

To hit all 3 of these critical points you need a software built to help small business owners take advantage of what their competitors are doing wrong.



PUT AN EMPHASIS
ON BUILDING TRUST.



PUT AN EMPHASIS
ON CREATING
RELATIONSHIPS.



PUT AN EMPHASIS
ON FOLLOW-UP.



READY TO GET STARTED?

START YOUR FREE 14-DAY "ALL ACCESS" TEST DRIVE OF CONNECT 365 TODAY AND GET FULL ACCESS TO PRE-LOADED SCRIPTS AND CAMPAIGN TEMPLATES THAT YOU CAN USE RIGHT AWAY, AND OVER \$10K IN ADDITIONAL BONUSES AND COACHING!

[GET STARTED HERE](#)