

# The Conversion Playbook

Create an automated Lead Generation Machine and turn your website traffic into sales.



# Whats's inside

1. Cover
2. What's inside
3. Introduction
4. About ProveSource
5. Chapter 1: Lead Generation 101
6. Chapter 2: Kicking off the Relationship
7. Chapter 3: The CRO Toolkit
8. Chapter 4: [Bonus #1] Extra Hacks
9. Chapter 5: [Bonus #2] Automated Sales System
10. Chapter 6: What's next

# Introduction

Hey there 🙋

- Are you having trouble generating sales?
- Do you want to book more meetings for your business?
- Are you looking to learn how to generate leads for your clients?
- Are you unsure how to improve your conversion rate?

I've been there, and here's what it probably looks like for you...

Users are ignoring or avoiding your ads altogether.  
They know what pop-ups are, and they're not willing to enter their email for a PDF file.

Maybe you've been following advice from Marketers who used to be relevant but got stuck using the same old tactics that are no longer effective.

Marketing, thanks to the abundance of available customer data, is evolving towards a model that includes authenticity and transparency at its core.

From conversational marketing to brands engaging in social issues, and email personalization, we're seeing a clear pattern.

The desire for consumers to **do business with people they trust**. Or better yet, businesses they can build a relationship with.

And this can unlock x2-3 conversion rates for your business.

To do that, you will need to take your users by the hand and invest in them.

Guide them throughout the Buyers Journey.

Turn them from anonymous website visitors into “real” humans inside your CRM.

Educate them, address their fears, and IF THEY'RE A GOOD FIT, engage in the conversation of how your product or service can help them.

This playbook is a product of many sleepless nights, and countless hours of research, experimentation, and discussions with experts, colleagues and clients.

I hope it can help you transform your business, your relationship with your clients and help you see the benefits of the new way of doing Marketing in the Digital world.

*Bill Stathi*

VP of Growth at ProveSource



# About ProveSource

The screenshot shows a website for Grant Cardone's book "Sell Or Be Sold". At the top, the Grant Cardone logo is on the left, and a quote "How To Gain Instant Trust, Get Anyone To Say Yes, And Live Life On Your Terms..." is on the right. The main headline is "SELLING IS THE KEY TO SUCCESS" with subtext "INCREASE YOUR INCOME - ACHIEVE SUCCESS - CLOSE MORE SALES - GET PROMOTED". Below this is a video player showing Grant Cardone at a desk with "SELL OR BE SOLD" signs. To the right of the video is a checkout form with two steps: "1 SHIPPING" and "2 FINALIZE ORDER". The form includes fields for Full Name, Email Address, Phone Number, Full Address, City Name, Select State, Zip Code, and United States. A green button at the bottom of the form says "Special Offer Click Here YES! I Want This FREE Book Now!".

**10X** **2,491** people  
Got a copy of "Sell Or Be Sold"  
in the past 3 hours ✓ by ProveSource

We are the social proof company.

ProveSource helps 25,000+ websites boost trust, credibility, conversions and sales using social proof.

Add smart, attractive and converting social proof notifications to your website or online store, boost conversions and sales.

Have you ever been even more excited to try a new restaurant because you see it's busy and popular?

**Well, same goes for your website.**

- CHAPTER 1 -

# Lead Generation 101

Why is it a good idea to have an email list, and how are sales different in the online vs the offline world?

# Direct sales vs building the relationship

There are **2 basic approaches** when trying to make a sale.

The first one is sending someone to a product page or a website and expecting them to buy right away.

Could be traffic from a Facebook Ad, a Google Ad, an Email campaign, etc.

This works for **small purchases** or **commodity products**.

Think about when buying a t-shirt, shampoo, a newspaper, your Spotify subscription, etc.

You wouldn't think a lot about buying a bottle of Coke, right?

This approach works well, and it's easy to build.

It's exactly what most B2C brands have been doing in the offline world.

And in fact, most eCommerce stores are still built like that.

Here's an sample flow of an online vs an offline **commodity purchase flow**:

Homepage (=kiosk) -> Category page (=different sections) -> Product page (=selecting a specific product) -> Add to Cart & Pay (=pay for the item)

However, this has two **MAJOR drawbacks**.

You have NO IDEA who your customers are until they end up purchasing from you.

In many cases, you might not know who they are even after they complete the purchase, but that's a different story.

The problem with this is that every customer is unique.

Sure, some might have similar characteristics, but ultimately they are motivated by different reasons.

And unless you know who they are, you cannot tailor your "pitch" to appeal to their particular situation or needs.

The second and most important problem is that this doesn't work for mid-to-higher ticket sales.

For example, an online course costing \$250, an iPhone, and of course B2B sales or anything with a sales cycle that requires a bit of thought.


When was the last time you purchased new servers for your company without doing a bit of research first?

It also doesn't work for new or novel products, and brands that the customer is unfamiliar with.

So you see we have a lot of cases where the traditional way of doing business just isn't effective.

The second approach is to first build a relationship with your audience, establish trust, get to know them, and then help them engage in a buying decision when they are ready.

This is the sleek way to do it, and probably the smoothest way to sell in the age of the Internet.



# The value of the Email list

But you might say “I don’t need a website”.

I have a large following on Instagram or TikTok, and I can sell directly through there via DMs.

Perfect.

So what happens once Instagram is no longer the “cool” platform and people stop engaging with your brand?

Or if it decides to ban your account for whatever reason.  
Do you lose all of your following?

Contrast that to having the contact details of the most engaged part of your audience.

Here are just some of the benefits of having an email list:

- You can reach out any time you like
- You have a private, direct channel of communication
- Your audience is a few clicks away from making another sale
- You can upsell, cross-sell, and promote your products directly
- You know who your most engaged audience members are
- You have a lot more data on your audience than before
- You can personalize your communication based on the individual you are speaking to

All these lead to increased relevance of your message to your audience, and this ultimately means higher engagement and more sales from your users.

# Building the Relationship

How and why does a user end up inside our CRM?

Well, the approach is part of what Hubspot coined as “Inbound Marketing”.

Providing value for free and building your relationship with your users, in exchange for an email address or other contact information.

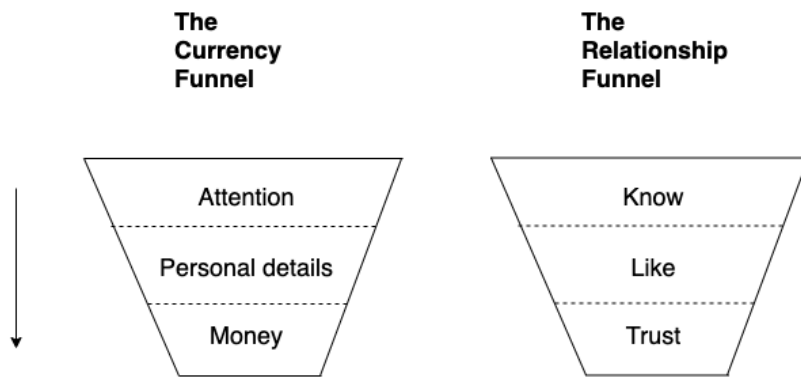
In this case, the user decides to enter your CRM or Email Marketing system willingly, because they like you, trust you, find your content valuable, and want to learn more about your business.

Now there’s actually a particular order that people follow, unwillingly most times, until they trust you with their money (aka buying from you).

That is what I call “The Currency Funnel”.

Meaning that people will initially pay attention to what you are saying, maybe watch an ad of yours, if it’s interesting to them.

Then they might enter their contact details to get a discount coupon, unlock a template, free training, a checklist, or even an ebook.

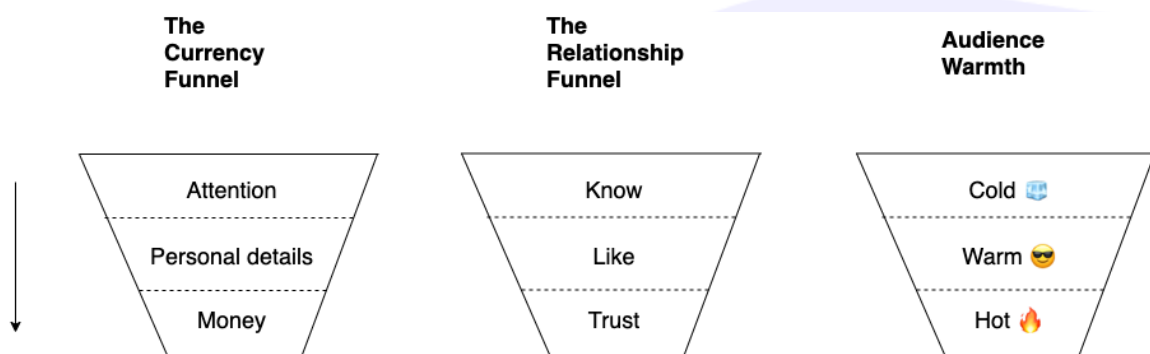


And if the information you provided them with is valuable enough, and if they like what they're seeing, the last step is to proceed in buying from you.

At the same time, there's another shift happening in the minds of your potential customers.

This is the actual opportunity for us.

As users consume your content and get to know you, their relationship to you becomes stronger, and their "temperature" changes from Cold -> Warm -> Hot.



That's the secret to sales.

Having a system that allows you to transform any Cold audience into Hot leads on your CRM, waiting eagerly to buy your new product.

This is what the Conversion Playbook is all about.




- CHAPTER 2 -

# Kicking off the Relationship

Understand the different offers and learn to connect with your audience at scale while making a profit.

Are you ready to see how we do this?

Awesome! We're going to go through the major steps of each phase and show you all the tools and strategies to follow, in order to:

1. Define your Ideal Sales Conversation
  2. Map out your Conversion Funnel
  3. Select the right Offer
  4. Deliver the Offer to your audience through the right tools
  5. Fill your CRM with valuable leads
  6. Have the ability to cross-sell, upsell and promote your products on a 1-to-1 basis
  5. Generate more sales and conversions than you ever thought possible
- 

# Define the Ideal Sales Conversation

Imagine you're at an electronics store.

You're browsing in the PC area, and after a few minutes a salesperson approaches you and asks "Would you be interested in a demo of the latest MacBook Pro?"

I'm assuming you know how that conversation continues from that point and on.

An Ideal Sales Conversation is a conversation (duh) that we want our customers to have when engaging with our brand, as it usually leads to a successful sale.

Our Lead Magnet, or the piece of information we're giving away for free, has the goal of allowing us to kick off the Ideal Sales Conversation (ISC).

The logic is "Since you did this" -> "You would probably also be interested in that".

If we can generate enough of these conversations at scale, and in an automated manner, it's like having the equivalent of a machine that prints cash inside our business. 💰

What I call **"The Conversion Machine"**...

And I'm hoping by this point you're starting to understand its power.

When designing our ISC, we need to have 3 things in mind:

- **Who** (the people involved in the conversation)
- **Where** (the location the conversation is taking place)
- **What** (the action the customer took, and the response from the business)

Let's go through some examples:

#### ➔ **SaaS**

Who: Salesperson and business owner who registered for a webinar

Where: Phone

What: "You have attended one of our webinars on Conversion Optimization. Let's talk about how you can generate more leads for your business..."

#### ➔ **Shopify store**

Who: Brand representative and man who entered his email for a discount code on the store

Where: Email

What: "Why not take advantage of your WELCOME coupon code with our latest collection of t-shirts!?"

#### ➔ **Agency**

Who: Account executive and Marketer who filled out a price estimate form about the services of an agency

Where: Live chat

What: "You just got a price estimate for our services. Want to discuss the kind of results you can expect from our engagement?"

Which is probably the opposite of what this guy is trying to do...



Or even this guy... ☐



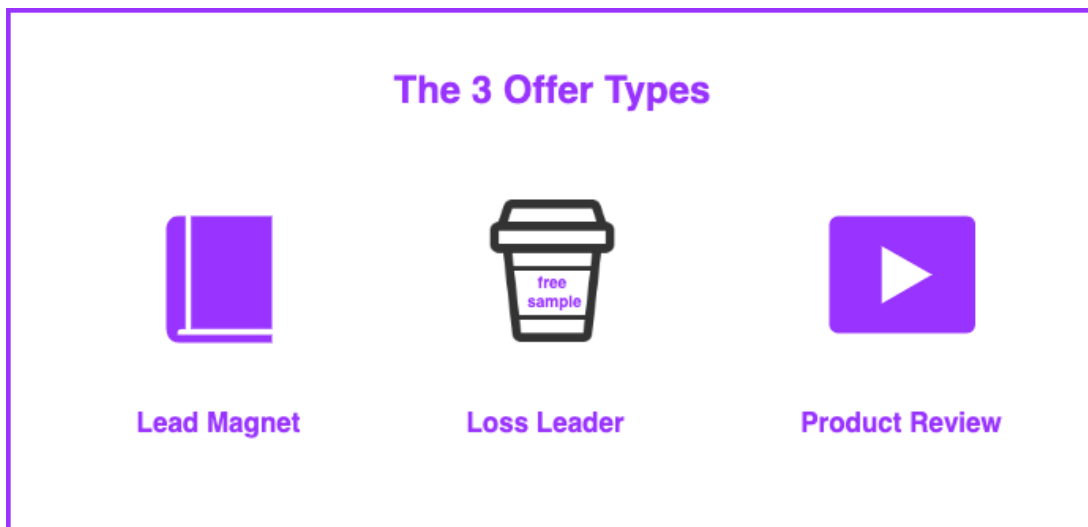
# The 3 Offer Types

This brings us to the main part.

What are you going to offer your audience to start the Ideal Sales Conversation?

Well there are three main types of Offers you can use.

- 1. Lead Magnet:** usually a highly valuable piece of information
- 2. Loss Leader:** a heavily discounted product
- 3. Product Review:** giving the buyer the ability to try the product for a specific amount of time



As you can tell, from the free information to the product review, there are different levels of commitment.

Someone agreeing to download an ebook or get a coupon code, is not the same as getting a demo of a SaaS platform, right?

This is important, because the greater the commitment from the user's side, the more likely they are to convert to a paying customer, so keep that in mind when deciding on a Lead Magnet.



# Examples of Offers

Here are some examples from each different type of offer.

## 1. Lead Magnet

The most classic type of offer you are going to come across.

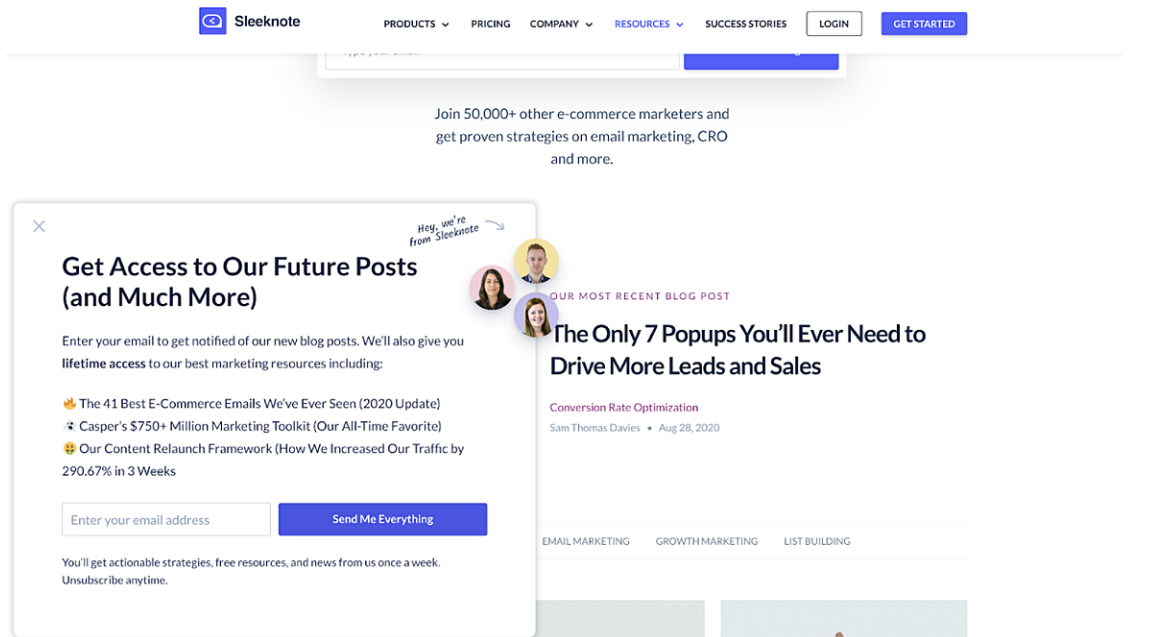
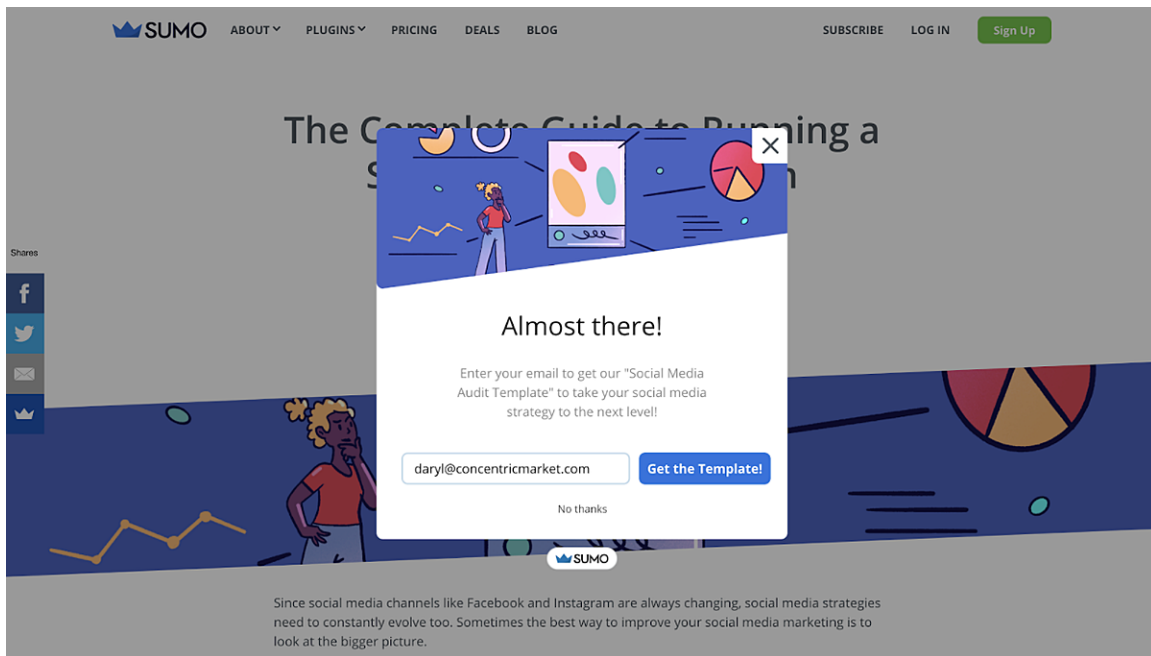
Most usually it's a free ebook, or a content upgrade, which is an additional piece of content inside an article or blog post (e.g. a Keyword Research checklist on an article about SEO).

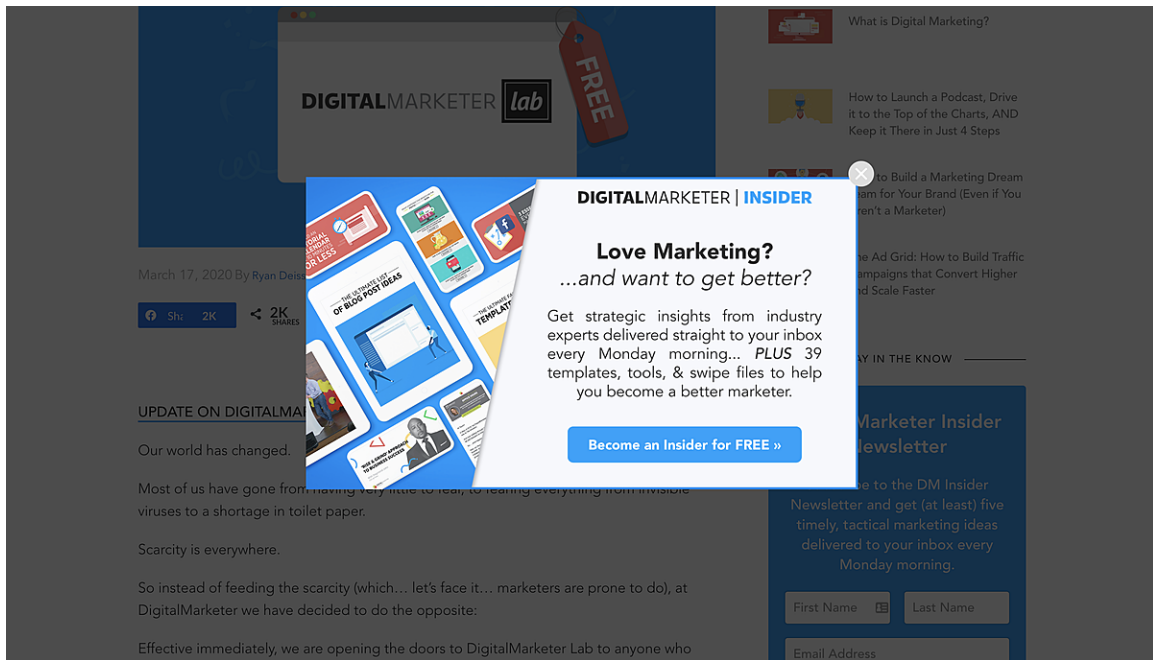
**Pros:** easy to produce in most cases/

**Cons:** lowest commitment from the buyer's side, businesses tend to overload users with information, which ends up hurting the conversion process that we are looking to build

 **Examples:** ebooks, content upgrades, reports, audit, calculators, templates, checklists, training videos, case study, webinar, mini-class

Here are some well known brands pulling the Lead Magnet Offer on their audience.





## 2. Loss Leader

A loss leader is nothing other than offering a product or service at a loss, in exchange for the users contact details, card details, and the opportunity to up-sell them right away, making up for the initial loss, and even making a profit.

This is the one most business people are afraid of, but it's one of the best ways to convert traffic into subscribers, especially for E-commerce businesses.

It is, however, a very popular tactic among those "who know" including most retail chains and large fast-food restaurants.

Haven't you ever wondered how McDonald's can afford to sell the Big Mac for \$1, when that's less than its actual cost of advertising to bring you to the store?

**limited time deal**  
**Buy One, \$1**  
**Get One for**

**Mix & Match**  
 Big Mac®  
 Quarter Pounder®\*\*  
 with Cheese  
 Filet-O-Fish®  
 10 pc. Chicken  
 McNuggets®

\*Weight before cooking 4 oz.  
 Limited time only. Valid for item of equal  
 or lesser value. Cannot be combined  
 with any offers.  
 ©2019 McDonald's

**FRESH BEEF**  
 COME WHEN YOU ORDER

Or why supermarkets advertise 20% or 30% discounts on specific categories of products?

Well, all this is because the main goal of their offer is to drive you into their store, where they can upsell you the fries and Coke (in McDonald's case) or the household essentials in the case of a supermarket.

<p>Coca-Cola, Pepsi or 7UP Select varieties, 2 Liter</p> <p><b>2\$3</b> for</p> <p>With Card</p>	<p>Tide Laundry Detergent Select Varieties, Liquid, 100 oz</p> <p><b>11<sup>99</sup></b></p> <p>With Card</p>
<p>Michelina's Entree Select varieties, 4-5.5 oz</p> <p><b>10\$10</b> for</p> <p>With Card</p>	<p>Totino's Party Pizza Select varieties, 8.5-12.3 oz</p> <p><b>3\$4</b> for</p>
<p>Hawaiian Punch Select varieties, Gallon</p> <p><b>2<sup>18</sup></b></p> <p>With Card</p>	

If you're still debating the power of the Loss Leader, just ask yourself when was the last time you left the supermarket having purchased only one single item. 😊

**Pros:** most businesses aren't using this because they're afraid it will be a total waste of money, so the companies who do it correctly end up attracting most of the clients.

**Cons:** it's a (calculated) risk from the business' side, and you need to be skilled enough or have prior experience of making it a profitable activity.

**Examples:** 90% discount code, free plus shipping, free makeup brush, \$3 for 10 movie downloads, \$1 for a burger, Amazon Prime Membership, etc.





If you're interested to learn how the music industry profited using Loss Leaders, read how Columbia House sold 12 CDs for as little as a penny [here](#).

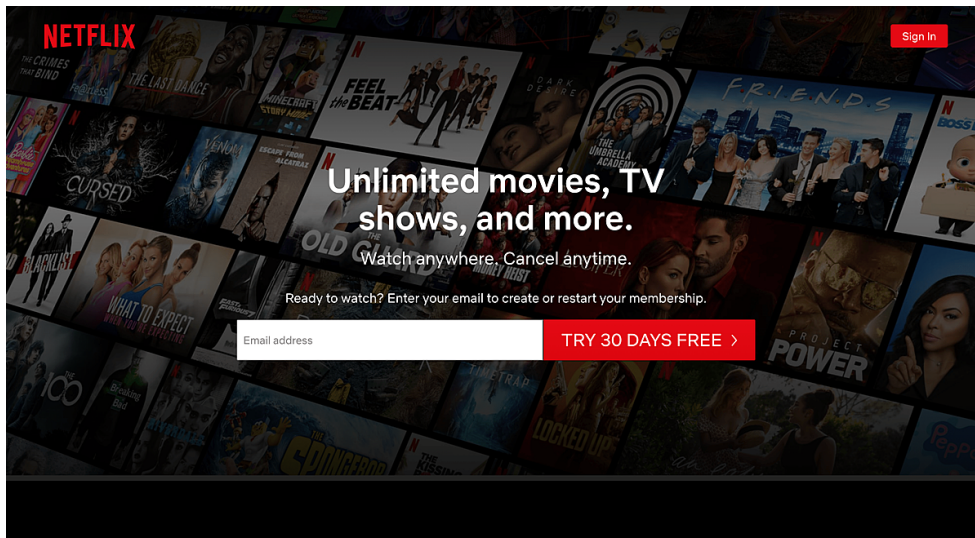
### 3. Product Review

Most common in the SaaS world and subscription services, a product review is nothing more than allowing the user to experience the product for free, usually in the form of a "free trial".

**Pros:** if you run a SaaS business, you probably already have a process like this in place, people are used to it so there's usually low resistance to try out a new product.

**Cons:** it's hard to turn free signups into paying users, especially if you don't require a credit card for the free trial.

🔑 **Examples:** free trial, free consultation, free demo, appointment, freemium service



## Multi-Step Entry-Point Offers

What's the goal of the Offer?

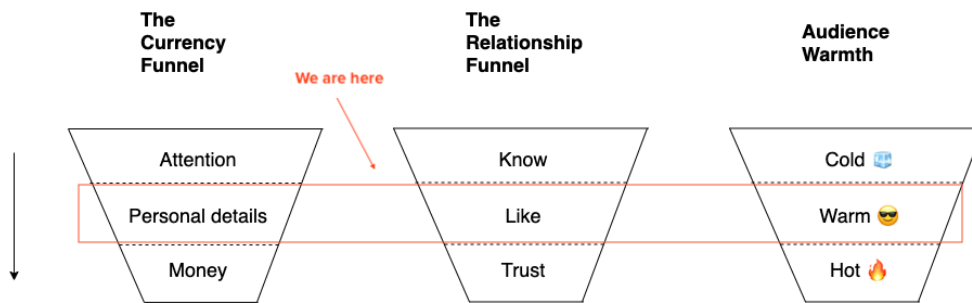
To start the Ideal Sales Conversation.

So, when a user opts-in to our offer, we need to continue the sales conversation they just started with us.

Failing to do this, is the most common mistake Marketers do.

Generating a lead, and then wasting the opportunity by letting the lead sit on the CRM untouched.

What we need to have in mind, is that the moment someone hands you their contact details, they're signifying that they have become - at least - a warm lead.



Which means it's the first good opportunity to present them with a low-ticket offer (a small purchase).

Some people are going to say no, and that's completely okay.

They might convert later using our [Secret Relationship Building Machine](#), or they might never convert.

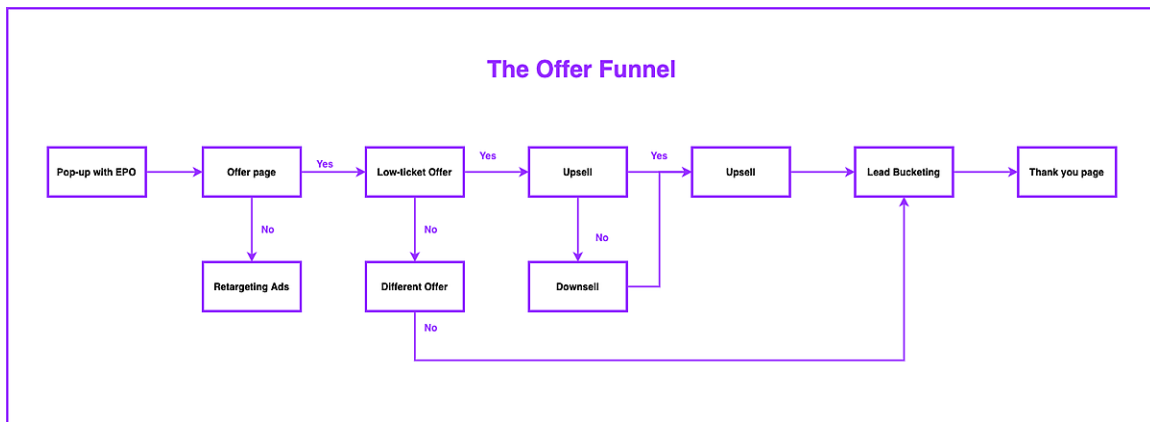
Again, nothing wrong with that.

Others might opt-in just for the initial offer, and that's also okay.

So what do we do after the conversion?

We follow up to close the sale, for the percentage of people who are ready to buy.

That's the funnel we're going to be building.



## The 6-step Offer Funnel

1. A user is presented with our EPO (Entry-Point Offer) either on our website or an ad.
2. They are taken to the dedicated Offer Landing page to enter their personal details. We can retarget them with Facebook Lead Ads if they end up not becoming a subscriber.
3. Then we present them with a limited time low-ticket offer, in the range of \$1-15. This is our first attempt at converting them into paying clients. If they are not interested, we can display a pop-up with a different offer, or just take them straight to step #6.
4. The upsell is a product with 2-3x the value of the low-ticket offer, and can well be in the range of \$25-45. If they say no to the upsell, we offer a down-sell product between \$15-35.
5. Last upsell could be a product similar in value to our initial upsell, or better yet a membership deal, locking them in as customers. This way they will keep producing recurring revenue even after the initial sale.

6. The Lead Bucketing step ensures that we get “personal” with the user, asking them 3-5 questions about their goals and current state of their business. This information will be then added to the user’s profile in our CRM, and be used to personalize our coming emails.

7. The final step is the Thank you page. :)

## **Offer Funnel Examples**

### **➔ SaaS**

Entry-point Offer: Webinar

Low-ticket offer: One-month trial (\$7)

Upsell: Lifetime Offer (\$490)

Downsell: One year of service (\$39)

Continuity offer: Lifetime updates & new features (\$14/month)

### **➔ Shopify store**

Entry-point Offer: 10% Off Discount coupon

Low-ticket offer: Animal print t-shirt (\$15)

Upsell: Hoodie (\$25)

Downsell: Growth Experimentation template (\$14)

Continuity offer: Premium Membership for free expedited shipping (\$4/month)

## ➔ Growth Hacking Agency

Entry-point Offer: Free 30' Growth Consultation

Low-ticket offer: The Growth Playbook (\$19)

Upsell: x3 hourly Growth Consultation Sessions (\$150)

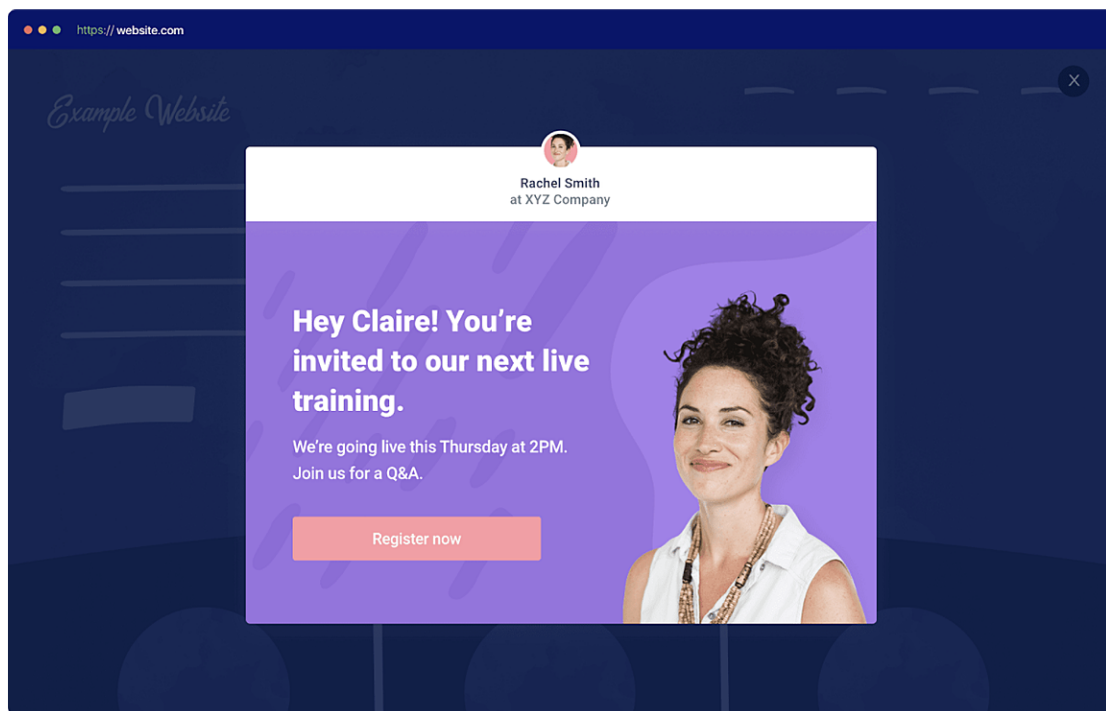
Downsell: Growth Experimentation template (\$14)

Continuity offer: Exclusive monthly Growth Guides (\$7/month)

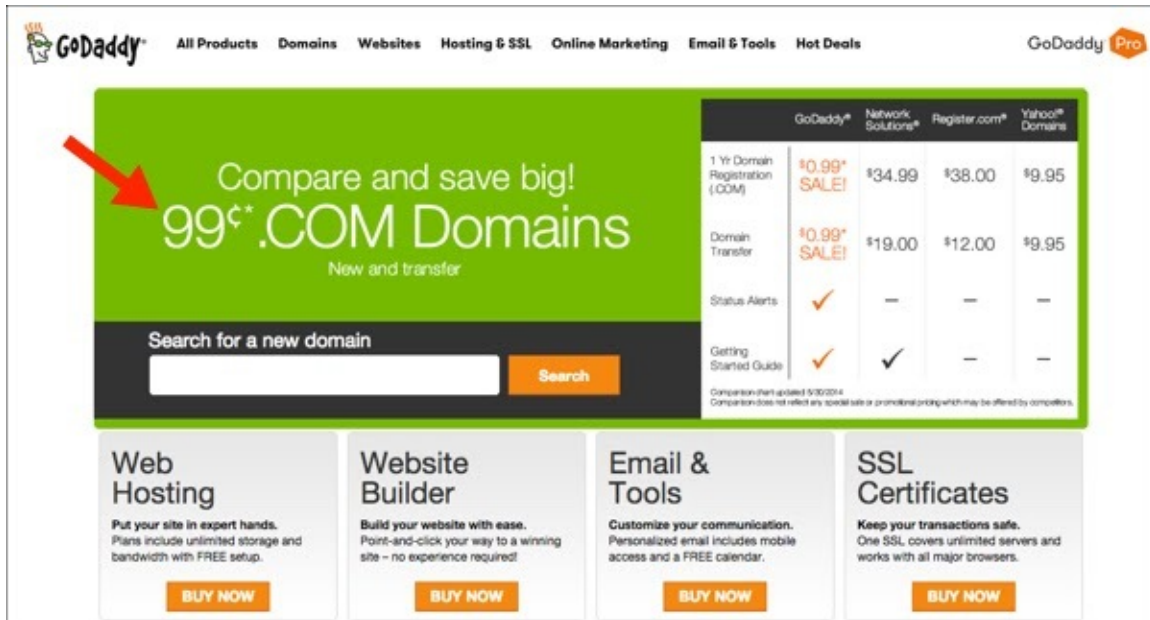
## Funnel Blueprints

I've put together some examples of what each step of the funnel looks like to give you some extra guidance when building your own funnels.

### 👉 Pop-up / Intro to the offer



## 👉 Entry-point Offer (EPO)



The screenshot shows the GoDaddy homepage with a prominent green banner for domain registration. A red arrow points to the offer: "Compare and save big! 99¢\*.COM Domains New and transfer". Below the banner is a search bar and a "Search" button. To the right, a table compares GoDaddy's pricing with competitors. Below the table are four service tiles: Web Hosting, Website Builder, Email & Tools, and SSL Certificates, each with a "BUY NOW" button.

	GoDaddy*	Network Solutions*	Register.com*	Yahoo! Domains
1 Yr Domain Registration (.COM)	<b>\$0.99* SALE!</b>	\$34.99	\$38.00	\$9.95
Domain Transfer	<b>\$0.99* SALE!</b>	\$19.00	\$12.00	\$9.95
Status Alerts	✓	—	—	—
Getting Started Guide	✓	✓	—	—

Comparison chart updated 5/10/2014. Comparison does not reflect any special sale or promotional pricing which may be offered by competitors.

### Web Hosting

Put your site in expert hands. Plans include unlimited storage and bandwidth with FREE setup.

**BUY NOW**

### Website Builder

Build your website with ease. Point-and-click your way to a winning site - no experience required!

**BUY NOW**

### Email & Tools

Customize your communication. Personalized email includes mobile access and a FREE calendar.

**BUY NOW**

### SSL Certificates

Keep your transactions safe. One SSL covers unlimited servers and works with all major browsers.

**BUY NOW**



The advertisement features a man in a suit sitting at a desk with a stack of books. A video player in the top left shows a timestamp of 1:00. To the right is an image of the book "Invisible Selling Machine" by Ryan Deiss. A large orange button with white text says "YES Ryan! Rush Me My Copy Of Your Book Before They're All Gone... >>". Below this, a line of text offers a hardcover copy for \$9.95, with a red arrow pointing to the price. A small footnote at the bottom explains the email delivery process.

**YES Ryan! Rush Me My Copy Of Your Book Before They're All Gone... >>**

**Get Your Hardcover Copy Of The "Invisible Selling Machine" Book For Just \$9.95**  
(Shipping & Handling is included for U.S. Orders. International Orders Add \$6.95 For Shipping & Handling)

\*After ordering your copy of "INVISIBLE SELLING MACHINE" you will receive an email with access to the digital download of the book and Part 1 of the BONUS Fast Start video.

## 👉 Upsells & Downsell

# thisisjustanexamplewebsite.com


~~\$14.99~~ **\$12.99\*** [SELECT](#)

☐ thisisjustanexamplewebsite.us Targeting Local shoppers? Add this: \$4.99


**! Get 3 and Save 67%**





thisisjustanexamplewebsite.net  
thisisjustanexamplewebsite.org  
thisisjustanexamplewebsite.info

~~\$51.97~~ **\$17.00\*** [SELECT](#)



## SECURE



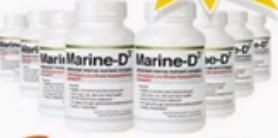


1 INITIAL ORDER

2 OPTIONAL UPGRADES

3 ORDER COMPLETED

**8 BOTTLES FOR JUST \$184**



**72% SAVINGS PER BOTTLE**

**ONLY \$23.00 Per Bottle!**

FREE US SHIPPING!

### 60-Day Money-Back Guarantee!

If I don't drop my blood pressure and

## LAST CHANCE TO GET MORE MARINE-D3...

Get An Additional 8 Bottles Added To Your Order Only \$23 Per Bottle (72% Savings Per Bottle)

A lot of private test group participants have voiced their concern about getting Marine-D3 in the future, especially since you were only allowed to order a small supply today.

After all, for best results, you need to take Marine-D3 everyday (like a daily vitamin), even on days where you feel good. Marine-D3 is NOT available in stores and you won't be able to get additional bottles until sometime next year when it's released to the general public at \$140.00 per bottle.

That's the bad news; the good news is, because you qualified today, and because of the amount you just ordered, at this hidden web page ONLY you can stock up on Marine-D3 by adding an additional 8 BOTTLES to the order you just placed for only \$184.

✓ Select options for 1 domain.

> Continue to Cart

Step 1 | Privacy

## Protect My Personal Information

As low as \$7.99/domain per year

Prevent your personal information from falling into the wrong hands.

No Thanks

What does my domain look like without Privacy Protection ⓘ



Step 2 | Options

### ☐ Website Builder + Hosting

Do-it-yourself, easy-to-use site designer. No technical skills needed.

Perfect for: Basic, personal and small business websites

As low as \$1.00/mo + a FREE domain, hosting and 1 year of Office 365 email\*\*.

Business Plus - \$10.99/mo

### ☒ Hosting

Web hosting with cPanel to build and manage websites. Some technical skills needed.


Perfect for: Web designers, web developers and businesses that use a designer

As low as \$4.99/mo + a free domain\*\*

Ultimate - \$7.99/mo

See What Everyone Is Saying About The Influencer Social Media Lead Machine

CLICK TO TURN ON SOUND



which is blown away

Get Instant Access to the Lead Machine >>

**Also Want Your Next 1000 Followers Fast?**

1 YOUR INFO  
Name & Email

2 UPGRADE?  
Add ViralPosts?

← Edit Shipping Details


ITEM	AMOUNT
Influencer Social Media Lead Machine	US\$9.00
<b>Order Total:</b>	<b>US\$9.00</b>


**YES, ADD IN VIRAL POSTS!**

**One Time Offer – Only \$39**

Want your next 6 MONTHS OF CONTENT SORTED plus a quick way to GO VIRAL and get your next 1,000+ Followers on Facebook?

**Copy This. Go Viral.**






**Wait! Your order is not complete!**


**Get 3 More For The Price Of 2! One Time Offer On This Page Only.**

Add our Organic Eye Serum to your order now and receive 25% OFF!



**Yes! I Want This Special One Time Offer**

**Order now and receive 25% off!**



The regenerative and healing properties will leave your skin looking and feeling **radiant and healthy within minutes of use.** Face and Eye Serum aids in restoring your skin to a more youthful state. Specifically created to assist in **reducing wrinkles and fine lines around the eyes** as well as aiding with dark circle reduction.


FRANK KERN

BEFORE YOU GO, LET ME JUST GET TO THE POINT...

**I'm making you an Amazing offer below:**

**Add "REFRAME" to your order for only \$297**

Get 15 different sales angles you can use to **get more clients** now by recreating the same offer. With "Reframe" I give you real world examples (that work) of how to use human nature and psychological switches to get more clients. I show you exactly what to do and what to say.

**FRANK KERN  
REFRAME**

No Thanks, I don't want this.

**YES I WANT THIS.**

Clicking the 'Yes, I Want This Button' will automatically add the Reframe training to your order and charge your card for \$297.


FRANK KERN

BEFORE YOU GO, LET ME JUST GET TO THE POINT...

**I'm making you an even better offer below:**

**Add "REFRAME" to your order for only 3 monthly payments of \$97**

Get 15 different sales angles you can use to **get more clients** now by recreating the same offer. With "Reframe" I give you real world examples (that work) of how to use human nature and psychological switches to get more clients. I show you exactly what to do and what to say.

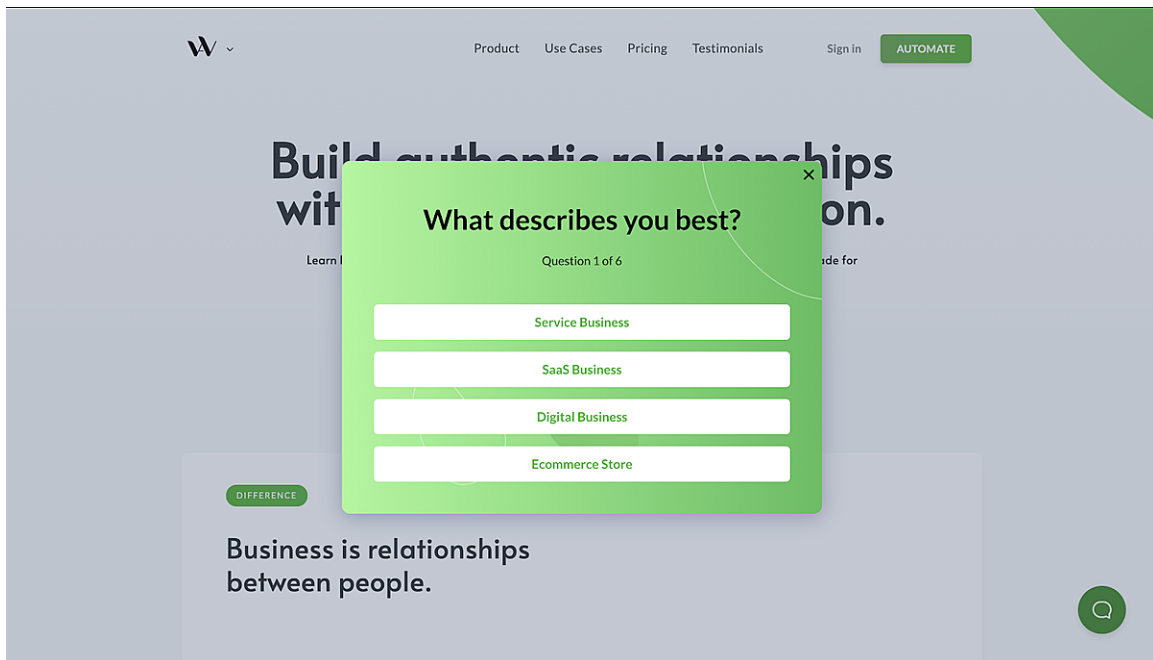
**FRANK KERN  
REFRAME**

No Thanks, I don't want this.

**YES I WANT THIS.**

Add this to your order for three monthly payments of \$97 via one-click transaction.

## 👉 Lead Bucketing



## Lead Bucketing

Right before the thank you page we have the Lead Bucket step.

This is a series of 4-6 questions to help us better understand our users.

These can include their industry, business goal, biggest obstacle atm, monthly revenues, etc.

- CHAPTER 3 -

# The CRO Toolkit

Learn the tools you need to implement a Conversion System  
for your business.

# All-in-One Marketing Kit

These are the tools you can use to implement the Conversion System, whether you run an eCommerce store, a training business, or anything in between.

## The CRO Toolkit

 zapier

 click funnels

 ConvertFlow

 Debutify

ActiveCampaign >

 CartFlows

 INTERCOM

 slack

 ManyChat

### Version A: For freelancers, consultants, online trainers

- Clickfunnels: end-to-end funnel design, pop-ups, CRM, and Email Automation. This is where you build your offer pages and do all of your Marketing.

### **Version B: For consultants, agencies, SaaS products, etc.**


- WordPress + Cartflows + Stripe: the agile way to create a sales funnel. This is where you build your offer pages as well as your funnels
- Intercom: live chat solution you can add to your traditional website to drive traffic to your offer pages
- Manychat: Messenger Marketing for your follow-up flows
- ActiveCampaign: a complete Email and Marketing Automation platform to store your leads, track their activity and build advanced, personalized email flows
- Convertflow: create pop-ups, top bars, and calls-to-action across your website and blog to drive traffic to your Entry-Point-Offer page.
- Slack: your unified notifications center for all the actions users are taking on your website.
- Zapier: connecting all your Marketing tools together


### **Version C: For Ecommerce**



- Shopify + Debutify: the absolute Shopify theme that allows you to implement upsell and down-sell flows off the box.
- Crisp: live chat you can add to your store to drive traffic to your offer pages
- ActiveCampaign: a complete Email and Marketing Automation platform to store your leads, track their activity and build advanced, personalized email flows
- Convertflow: create pop-ups, top bars, and calls-to-action across your website and blog to drive traffic to your Entry-Point-Offer page.
- Slack: your unified notifications center for all the actions users are taking on your website.
- Zapier: connecting all your Marketing tools together

Zapier can help you pull all your data in one place, whether it's orders from your store, or leads from pop-ups you generated using Convertflow.

## Connect Shopify to 2,000+ Apps



 Shopify

 Search for an app to connect





**Add new paid Shopify orders to a Google Sheets spreadsheet**  
Shopify + Google Sheets

TRY IT





**Add new Shopify customers to ActiveCampaign**  
Shopify + ActiveCampaign

TRY IT





**Share new paid orders from Shopify to Slack**  
Shopify + Slack

TRY IT



**Add new Shopify paid orders to Google Sheets**  
Shopify + Google Sheets

TRY IT



**Add new Shopify customers to HubSpot as contacts**  
Shopify + HubSpot

TRY IT



- CHAPTER 4 -

## **[Bonus #1] Extra Hacks**

Learn the tools you need to implement a Conversion System  
for your business.

## What if I have an existing website / CMS which doesn't support these fancy tools?

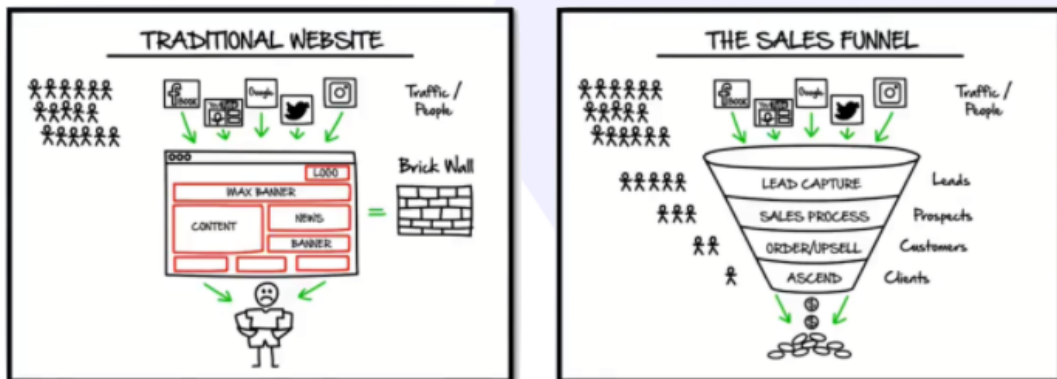
That's not a problem. You can purchase a new domain and work with that.

In fact, a lot of the famous Marketers out there do that.

Another way around it would be to create a subdomain on your existing domain, where you can add WordPress with Cartflows and set up any number of funnels that you want.

Websites are useful for many things like introducing your business to the world, creating a shop online (E-commerce), engaging with your audience through blog posts, and pages.

Landing pages and Sales funnels are used to generate leads and make visitors do something depending on the specific goal they want.



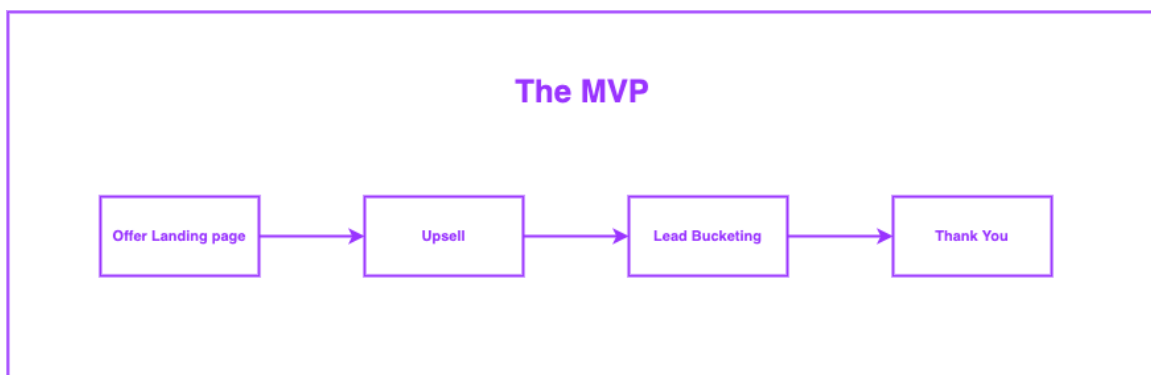
## Start with an MVP

If you're starting from scratch, it will be almost impossible to get everything in place in one try.

You can, instead, do it in 2-3 iterations, while keeping track of what's working for you, and optimizing the parts that aren't performing well.

This is what you need:

1. Offer Landing page
2. An Upsell
3. Lead Bucketing
4. Thank you page



- CHAPTER 5 -

# **[Bonus #2] Automated Sales System**

The 3 parts of an automated Sales System: Traffic, Lead  
Generation, Nurturing.

What we went through, is only the middle part of a multi-layered Growth Machine.

There's actually 2 other parts, one that comes before, and one that comes after the Conversion Playbook to help you establish long-term relationships with your customers.

## The "Before"

How do we drive traffic to our website or landing pages?

That's the objective of the [Traffic Machine](#), the 3x3 Content Grid, LinkedIn Lead Generation, leveraging communities and using Facebook Ads to bring traffic to your website.

We want to create a story that warms up our potential customers and follows them throughout their Conversion journey, boosting our results by adding credibility and helping us better connect with our audience.

## The "After"

What happens when a lead lands on our CRM?

Did the lead end up purchasing, or not?

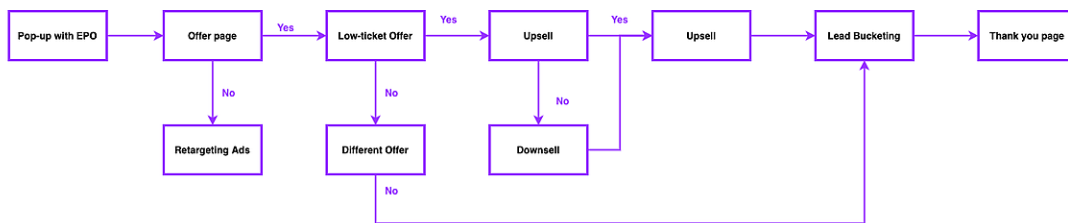
How do we guide them to the next step?

The "after" part is the [Relationship Building Machine](#), which combines Marketing Automation, Email Marketing, and Messenger Marketing to nurture our leads, speak to them in their language, position our product(s) and services accordingly, in an automated and effective way.

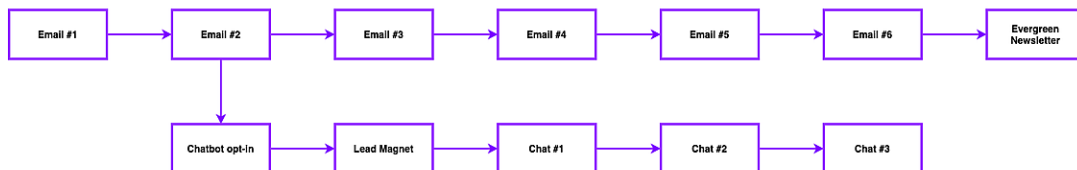
### 1. The Traffic Machine



### 2. The Conversion Machine



### 3. Relationship Building Machine



- CHAPTER 6 -

# What's next

You now have all the tools to build your own Lead Generation System from scratch.

## What's next

You should now have a much better understanding of what a Conversion System looks like.

How to generate leads on autopilot, and how to increase your cart size with upsells and downsells.

It's a lot of work, but all the companies who have implemented it have seen amazing results.

Now it's your turn to put in the effort and show the world the potential of your business.

P.S. The Traffic Machine and The Relationship Machine are going to be released soon, so if you haven't done it yet, [go here to get early access](#).

**Good luck! 🍀**





# Boost your sales

Get free access to the #1 Social Proof toolkit and join 25,000+ businesses who increase their conversion rate using ProveSource.

"Awesome must have tool for every marketer or an online business!

Easy to use, great UX/UI and most importantly - gets me more leads 😎👉👉👉👉"

**Aviel S.**

CEO @ Bella Digital

Start Generating More Sales