



BUILD A LEAD GENERATION MACHINE THAT GETS RESULTS **WITH AI**

Todd Laire
LAIRE | A Digital Growth Agency





TODD LAIRE



Co-Founder and CEO of LAIRE, a digital marketing and revenue growth agency with notable experience in marketing, sales, and lead generation in multiple industries. Todd is driven by results and equips LAIRE clients to do the same, by providing them with the tools they need for internal alignment, sales enablement, and revenue growth.

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→ married2marketing.com



BEYOND THE BASICS:

8 KEY COMPONENTS OF A LEAD GEN MACHINE, WITH AI SUPPORT

01/ FOUNDATION

02/ STRATEGY

03/ WEBSITE

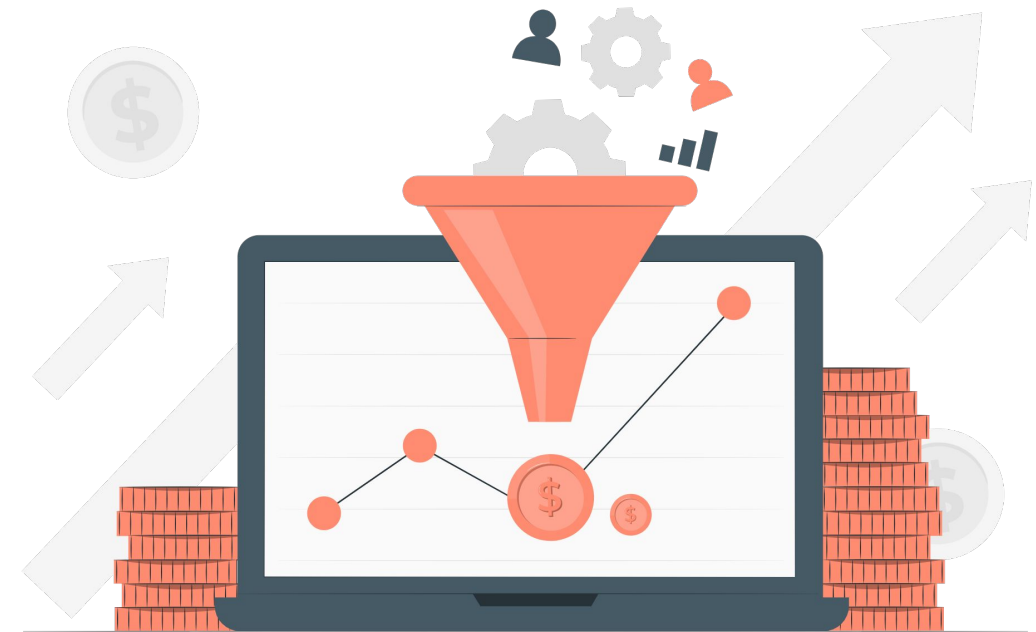
04/ OFFERS

05/ CRM

06/ EMAIL

07/ DIGITAL ADS

08/ AUTOMATION



LINK TO DOWNLOAD SLIDES IS AT END OF PRESENTATION

— FOUNDATION

CLEAR BRAND STANDARDS

- **BRAND USAGE** - All departments should employ the same brand standards and templates. Consistency builds trust with your prospects.
- **VOICE**- A consistent brand voice is essential for creating a strong and cohesive brand identity.

Logo

The LAIRE logo is a word mark with a box encompassing the entire word. The A in the logo is representative of LAIRE core values, which are: growth and upward movement. The A can also be used as a stand-alone icon.

PRIMARY LOGO



SUPPORTING ICON



SECONDARY LOGOS



>>Brand Development Resource:
*How Brand Consistency (and Rock-Solid
Brand Guidelines) Generate Revenue*

CLEARLY DEFINED PERSONAS

- No assumptions; conduct interviews!
- Pains, pains, pains
- Where are they and how do we reach them?
(social, ads, emails, events)

>>Buyer Persona Resource: Inbound Marketing Best Practice: The Secret to Creating B2B Buyer Personas

Based on our goals, targeted content should be created for personas defined by their role (users and promoter).



Generalist Greg



Retirement
Planner Ryan



Evangelist Ed

BUYER PERSONAS

Evangelist Ed

Ed oversees a group of financial planners and needs a financial planning software that is easy to use and supports the bottom line.



Background

- Later in career, 50s to 60s
- Is a decision-maker at his organization; may be a Director or Consultant
- Organization is likely a small to medium financial services or life insurance (annuity) company
- 10-25 or less than 50 employees, 1 or 2 person shop
- Is a software promoter, working to onboard software company-wide and create buy-in from users

Problems/Challenges/Pains

- Simplifying complex financial data into more accessible snap-shots — for team of advisors and their clients
- Finding a financial software solution that: is easy for his team and their clients to learn and use; offers on-demand training modules for self-paced learning; is Zoom-friendly, interactive, and uses real-time data; provides reliable data encryption, security, and backups; integrates seamlessly with existing systems
- Building awareness and buy-in of selected financial software within his dispersed team

Keywords


financial planning software, enterprise financial planning software, corporate financial planning software, financial planning software for advisors, financial planning software comparison, best financial planning software for professionals

DEFINING PERSONAS WITH AI




- AI can help you identify your audience's top pain points. Keep in mind, you'll get better outputs if you give the tool as many details as possible — for example, role, industry, etc.

AI PROMPT:



You're a financial services firm trying to target an audience of soon-to-be retirees looking for help with retirement planning. What are some challenges and pain points this audience might face? 



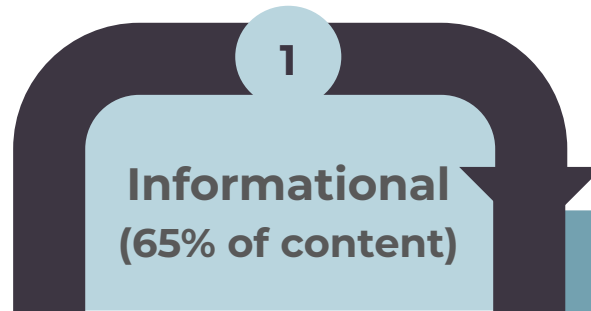
Absolutely, here are some challenges and pain points that soon-to-be retirees might face when it comes to retirement planning:   

1. **Financial Uncertainty:** As retirement approaches, individuals may experience uncertainty about whether their savings and investments will be sufficient to maintain their desired lifestyle throughout their retirement years.
2. **Lack of Clarity:** Many soon-to-be retirees struggle to determine how much they'll need to save, invest, and allocate for healthcare costs, travel, and other expenses during retirement.
3. **Complexity of Investment Options:** Navigating the myriad of investment choices can be overwhelming, particularly for those who lack experience in financial markets and instruments.
4. **Healthcare Costs:** Healthcare expenses tend to rise as people age, and the prospect of managing these costs during retirement can be a source of stress.

CONTENT **AT EVERY STAGE**

AWARENESS

Realizes they have a problem to solve and becomes aware of potential solutions in the market

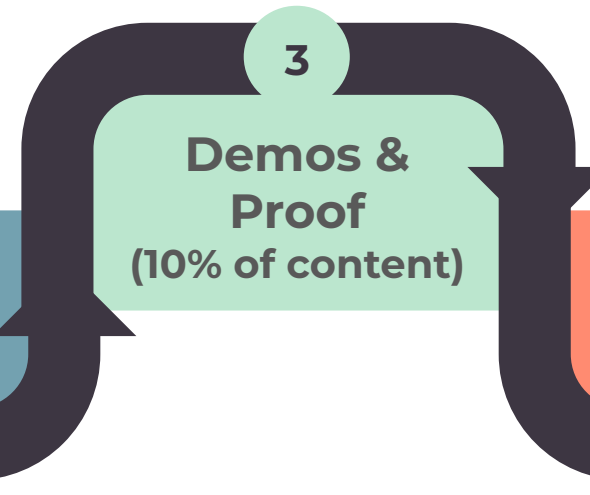


Comparisons
(25% of content)

2

DECISION

Has narrowed down their options and is ready to make a purchase



Referrals &
Delight

4

CONSIDERATION

Evaluates different options and considers potential solutions that could address their needs

CUSTOMER

Evaluates purchase experience and may provide feedback, write reviews, and share their experiences with others

CONTENT **AT EVERY STAGE**

AI PROMPT:

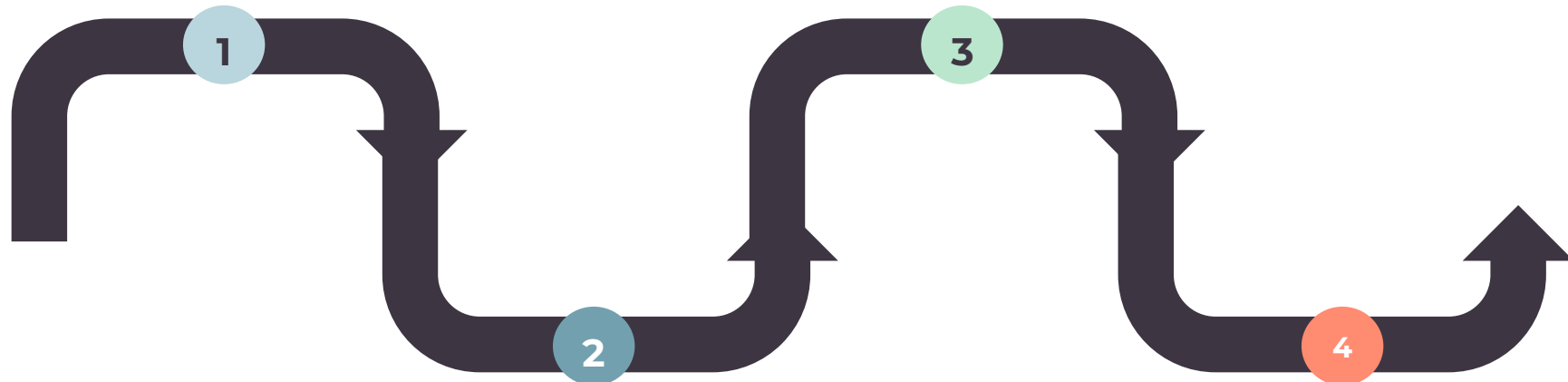
You're a financial services firm trying to target an audience of soon-to-be retirees looking for help with retirement planning. Provide ideas for blogs, downloadable offers, and other content for each stage of this audience's buyer's journey.

AWARENESS

Offer: *The Ultimate Guide to Financial Planning for Retirees*

DECISION

Case Study: *How X Financial Services Firm Helped Soon-to-Be Retiree Save for the Future and Protect Their Legacy*



CONSIDERATION

Blog: *Benefits of Hiring a Retirement Financial Planner vs DIY*

CUSTOMER

Email: *Refer a Friend and Save on Your Retirement Planning Package*

DEFINE GOALS

Brainstorm with your leadership team to define overarching company goals and inform marketing KPIs

IDENTIFY KPIs

- Vanity metrics don't inform lead conversions
- Ensure KPIs are S.M.A.R.T. (Specific, Measurable, Attainable, Relevant, Timely)
- Define the benchmarks that will show progress toward your goals
- Think outside website visits (track exit rate, post interactions, bounce rate, new visitor, returning visitors, etc.)



FINANCIAL SERVICES CASE STUDY

Financial Planning Firm
Boosts Conversion Rate by
1180%



MANUFACTURING CASE STUDY

Growth-Driven Design
Propels Manufacturer,
\$100k Closed in 1 Month

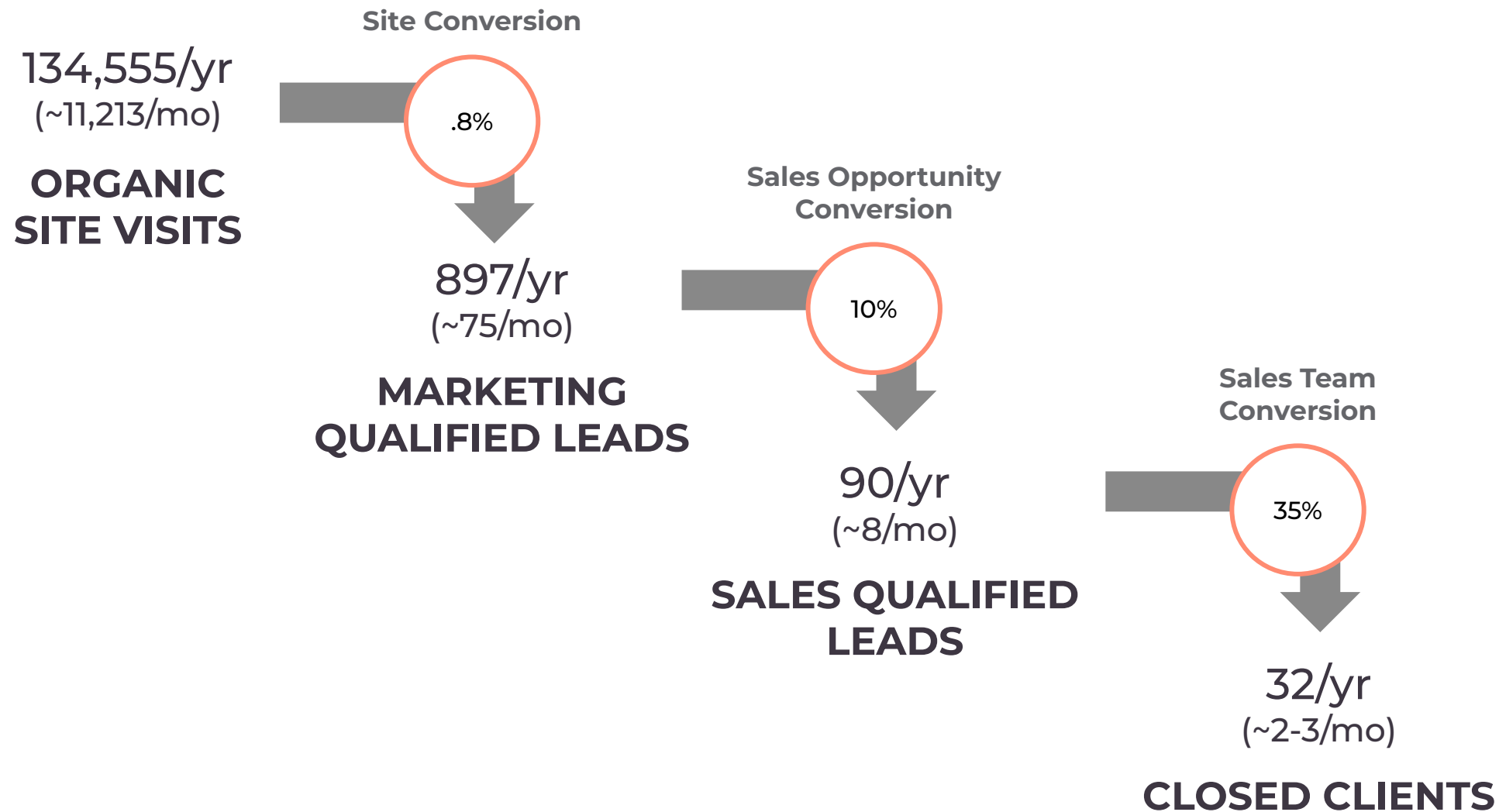


CASE STUDIES

BioIT Service Provider Sees 486% increase in
Website Visits Through Google PPC Advertising

[READ CASE STUDY →](#)

WEBSITE TRACKING, MAPPED TO GOALS



Range from \$5,500 - \$15,000 (\$10,250 avg) = \$328,000 new ARR from web leads

STRATEGY

Strategy Before Tactics

WHERE ARE YOU AS A BUSINESS / YOUR PRODUCTS?

- Awareness building stage? Still developing solutions?
- Or presenting fully formed solutions and education to your prospects?

WHERE ARE YOU DIGITALLY?

- No traffic, need exposure?
- Already generating traffic, but no hook for leads?
- Getting leads but they're not qualified?

>> Marketing Strategy Resource: Marketing Strategy vs. Marketing Plan - What's the Difference.

STRATEGY

Where are you digitally?

No traffic, need exposure?

AI PROMPT:

You are a marketer creating a plan for a [industry] business that specializes in [key products or services] for [target audience]. Outline key social platforms the business should have a presence on to reach its audience.

Already generating traffic, but no hook for leads?

AI PROMPT:

Create an engaging CTA for [describe topic].

Getting leads but they're not qualified?

AI PROMPT:

You are a paid media marketer. Create a Google search ad keyword strategy about [topic] that targets individuals who are [buyer intent].

WEBSITE

Optimize your website for lead generation *beyond* content and SEO.



MESSAGING

- ✓ **DO:** Center your messaging around your personas' pain points
- ✓ **DO:** Use “you” statements
- ✓ **DO:** Incorporate smart content

DO YOU NEED TO FIND THE RIGHT MARKETING SOLUTION FAST?

Struggling to generate new leads and grow sales opportunities? If so, you're not alone.

MESSAGING

AI PROMPT:



Generate 5 catchy slogan ideas for a residential construction business called Philly Builders that specializes in home remodels for multi-generational households.



1. "Building Homes, Uniting Generations: Philly Builders"
2. "Creating Spaces for Every Generation: Philly Builders"
3. "Renovating Homes, Strengthening Bonds: Philly Builders"
4. "Crafting Homes for Lifelong Memories: Philly Builders"
5. "Transforming Houses into Multi-Generational Havens: Philly Builders"



— CONVERSION POINTS

- ✓ **DO:** Include multiple conversion points per page/blog
- **Low risk:** Subscribe to our blog
 - **Medium risk:** Download our free guide
 - **High risk:** Request a consultation

>> Website Conversion Resource:
6 Strategies to Increase Conversions on Your B2B Website

Would you convert on this?

Blog Post

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.

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Embedded
Link

...or this?

Blog Post

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper.

Get the complete guide to [blog post topic].

Business Email

Download Now

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Callout with
Embedded Form

— CONVERSION POINTS

✗ DON'T: Rely on dull and overused language for your CTAs (Submit, Download, Get Started)

Are you struggling to streamline internal processes, prove ROI with better KPIs, and keep up with marketing tasks that constantly derail your day?

Help has arrived!

BE A BETTER MARKETER

Blogging but not seeing results?

If you want better engagement and more leads without hours and hours of work, blog templates are the solution you've been looking for.

MAKE MY LIFE EASIER

— CONVERSION POINTS

AI PROMPT:

Take the following call-to-action and convert the tone to [describe tone]: [list CTA copy].

Are you struggling to streamline internal processes, prove ROI with better KPIs, and keep up with marketing tasks that constantly derail your day?

Help has arrived!

BE A BETTER MARKETER

Blogging but not seeing results?

If you want better engagement and more leads without hours and hours of work, blog templates are the solution you've been looking for.

MAKE MY LIFE EASIER

— CONVERSION POINTS

- ✓ **DO:** Use best practices with forms
- Ask for only what you need
 - Inject personality where appropriate
 - Forms should be progressive

Book my assessment.

First Name*

Last Name*

Business Email*

Phone Number*

Company Name*

Website URL*

Job Title

protected by reCAPTCHA
[Privacy](#) - [Terms](#)



LET'S DIVE IN

— CONVERSION POINTS

✓ **DO:** Use best practices with forms

- Ask for only what you need
- Inject personality where appropriate
- Forms should be progressive

Please tell us a bit about yourself:

Business Email*



Phone number*

What industry are you in?

Please Select



Message

Please tell us more...

Do you have and use a marketing plan?

- ☐ Yes
- ☐ No
- ☐ Kind of



How much of an investment in marketing do you think it will take over the next 12 months to take your business to the next level? (this total includes advertising, PR, consulting, direct mail, etc)

- ☐ Under \$5,000 (the self-study version may be the best option for you)
- ☐ Under \$10,000 (If you are a very small service business, this may be bare minimum)
- ☐ Under \$20,000 (If you are a small service business, this may be an effective amount. If you are a product/retail business, this is bare minimum)
- ☐ Between \$21,000- \$49,000 (Good, you know marketing is

— ACCESSIBILITY & ADA COMPLIANCE

✓ **DO:** Test your website structure and assets for all abilities



- Contrast of text colors
- Appropriate font size
- Test tap points of buttons
- Alt text for all, including images, call to action buttons, and charts
- Clear and expressive button text — tell them where they're going

 A11y - Color Contrast Checker 


1 error(s) found in AC Trial Page

We're listing them below.


Normal fonts (< 19px)	Large fonts (19px +)
AA compliant: 4.5:1	AA compliant: 3:1
AAA compliant: 7:1	AAA compliant: 4.5:1



Text lightness





Background lightness



Contrast Ratio

4.01

 **AA**

 **AAA**

AI WEBSITE OPTIMIZATION



You are a marketer planning a new website for your company that specializes in financial services for dentists. Outline what key web pages need to be present on the site for this audience to maximize sales.



Outline for a Financial Services for Dentists Website:

I. Home Page

A. Introduction

1. Brief overview of the company's financial services for dentists
2. Engaging headline and imagery

B. Value Proposition

1. Clear benefits of choosing your financial services

C. Call to Action

1. Encourage visitors to explore services or contact the company

D. Trust Signals

1. Testimonials from satisfied dentist clients
2. Certifications or affiliations with relevant industry organizations

E. Blog Highlights

1. Links to recent, informative blog posts

F. Contact Information

1. Phone number, email, and contact form

G. Navigation Menu

1. Links to other key pages

II. Services

A. Overview of Financial Services

AI PROMPTS:

“You are a marketer planning a new website for your company that specializes in [key products or services] for [target audience]. Outline what key web pages need to be present on the site for this audience to maximize sales.”

“You are a UX designer.

Create an intuitive website navigation structure for a [industry] website with the following content: [list key webpage topics].”

“You are a web developer.

Find errors in the following code: <paste code>.”

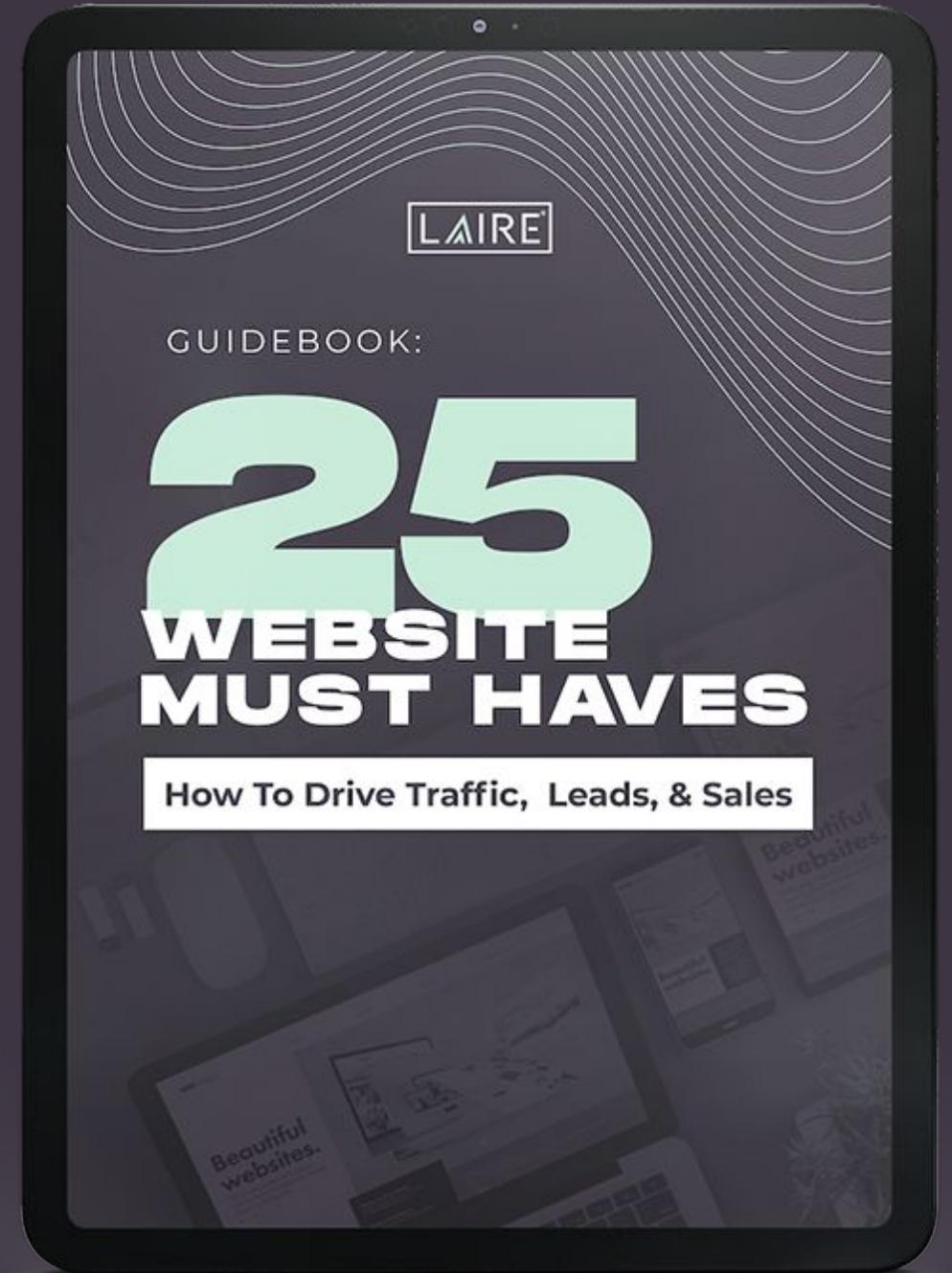
RESOURCE

25 WEBSITE MUST-HAVES

How to Drive Traffic, Leads & Sales

- How to get found online with search engine optimization (SEO), including building inbound links, meta tags, and more
- Important design and usability factors you need to know
- Tips for creating content that attracts and keeps visitors on your website

[>> Download Guide](#)





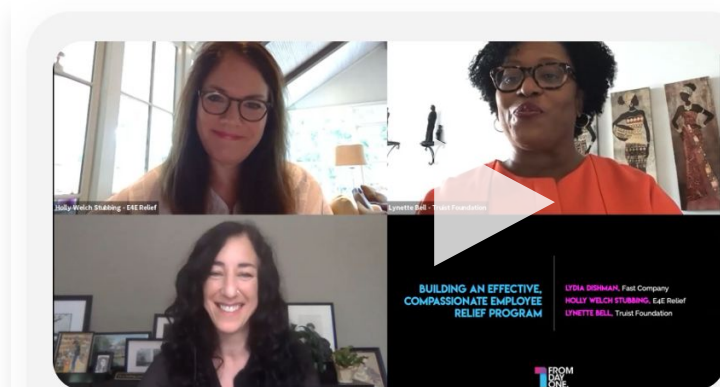
OFFERS

Does your audience *really* want
another eBook?

— CONTENT OFFERS & LEAD MAGNETS

✓ **DO:** Switch up and expand your offer format

- Podcasts
- Webinars
- Infographics
- Interactive Demos
- Videos
- Exclusive Communities
- Courses
- Quizzes
- Calculators
- Templates



EMPLOYEE RELIEF

Building an effective employee relief program | E4E Relief & Truist

— UNGATED VS. GATED CONTENT

Ungated content can be a powerful tool for building brand awareness, increasing website traffic, and establishing thought leadership.

- Blog articles
- Video libraries
- Case studies
- Podcast episodes

On the flip side, **gated content** is an essential tool for lead generation and nurturing. Users share contact info to access assets.

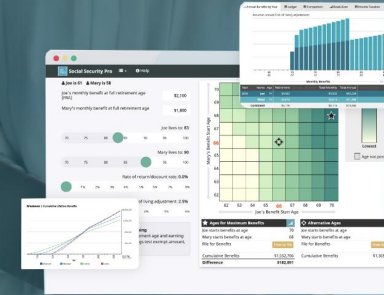
- Big eBooks
- “Ultimate” Guides
- Templates
- Workbooks
- Webinars

[>> Ungated vs Gated Resource](#)

LANDING PAGES

- ✗ **DON'T:** Present users with too many different actions to take
- ✓ **DO:** Remove navigation and distractions
- ✓ **DO:** Provide clear expectations – “book a 15-minute call”
- ✓ **DO:** Use multimedia to engage
- ✓ **DO:** Consider a secondary CTA below the fold

Pick a software solution.
Start a free 14-day trial.



Nothing to lose, lots of efficiencies to gain!

Technology should simplify your planning process, not complicate it. Most of our tools don't require any training, and it takes less than five minutes to build a plan.

Try any of our software solutions, risk free. Your credit card won't be charged for 14 days, and you can cancel or modify your subscription at any time.

- 1.) Fill out this form
- 2.) Proceed to part 2 verifying your trial
- 3.) Check your email for your personalized login

That's it! That's all you have to do to get this software started working for you.

Try this planning software today:

FIRST NAME*	LAST NAME*
<input type="text"/>	<input type="text"/>
BUSINESS EMAIL*	BUSINESS NAME*
<input type="text"/>	<input type="text"/>
YOUR PLANNING FOCUS:*	SOFTWARE TO TRIAL:*
<input type="text"/>	<input type="text"/>

START TRIAL



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>> Landing Page Resource:
The Only CRO Checklist You Need

A grayscale photograph of an office environment. In the foreground, a woman is seated at a desk, looking at a laptop. Behind her, a man with glasses is also seated at a desk, looking at a computer monitor. In the background, another man is visible, working at a desk. The office has large windows and modern furniture. An orange horizontal line is positioned above the 'CRM' text.

CRM

Make your CRM work for you.

LAIRE®

— LEAD CLASSIFICATION

Develop an effective lead classification system that kick-starts your sales enablement strategy and aligns your team on lifecycle stages:

- Host a “smarketing” session to determine characteristics of ideal customer
- Create an SLA with sales team (EX: what action to take when an MQL converts to SQL)
- Use a robust CRM tool (such as HubSpot) to automate lead classification process



CONTACT



LEAD



MQL



SQL

[>> Lifecycle Stages Resource](#)

LEAD CLASSIFICATION

AI PROMPT:

You're a marketing manager planning a brainstorming session with your sales and marketing teams. The goal of this session is to determine the characteristics of your company's ideal customer. What are some questions you should ask both teams to achieve this goal?



Absolutely, defining the characteristics of your company's ideal customer through collaboration between the sales and marketing teams is a critical step for targeted marketing efforts. Here are some questions you could ask both teams during the brainstorming session to achieve this goal:

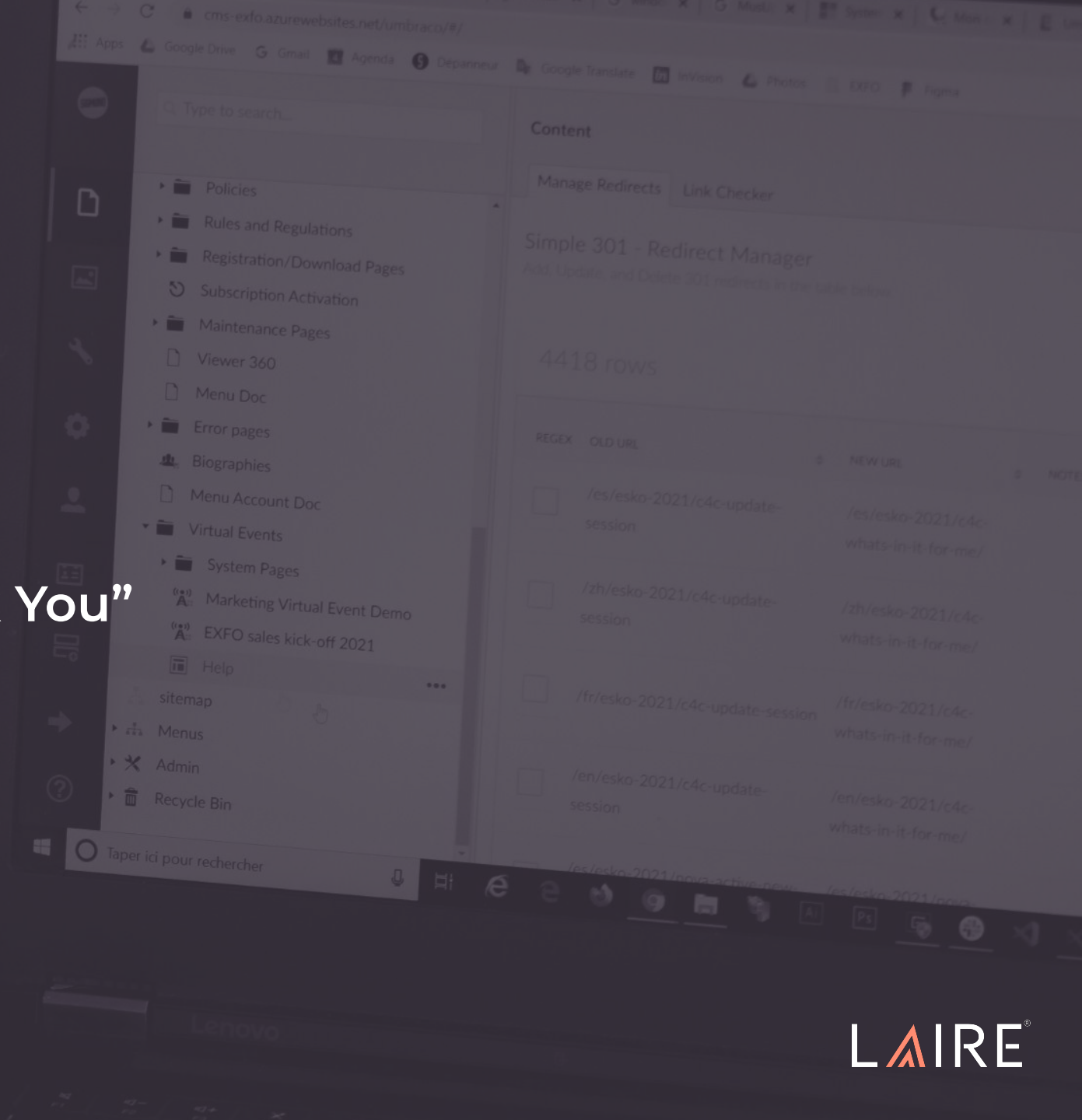


For Both Sales and Marketing Teams:

- 1. Can you describe the types of customers who have been the most satisfied with our products/services in the past? What made them stand out?**
- 2. What industries or sectors have shown the most interest in our offerings? Are there any trends or patterns?**
- 3. Are there certain geographical areas or regions where our products/services have gained more traction?**

EMAIL

Take your templated “Thank You”
and RSS emails up a notch.



NEXT LEVEL EMAILS

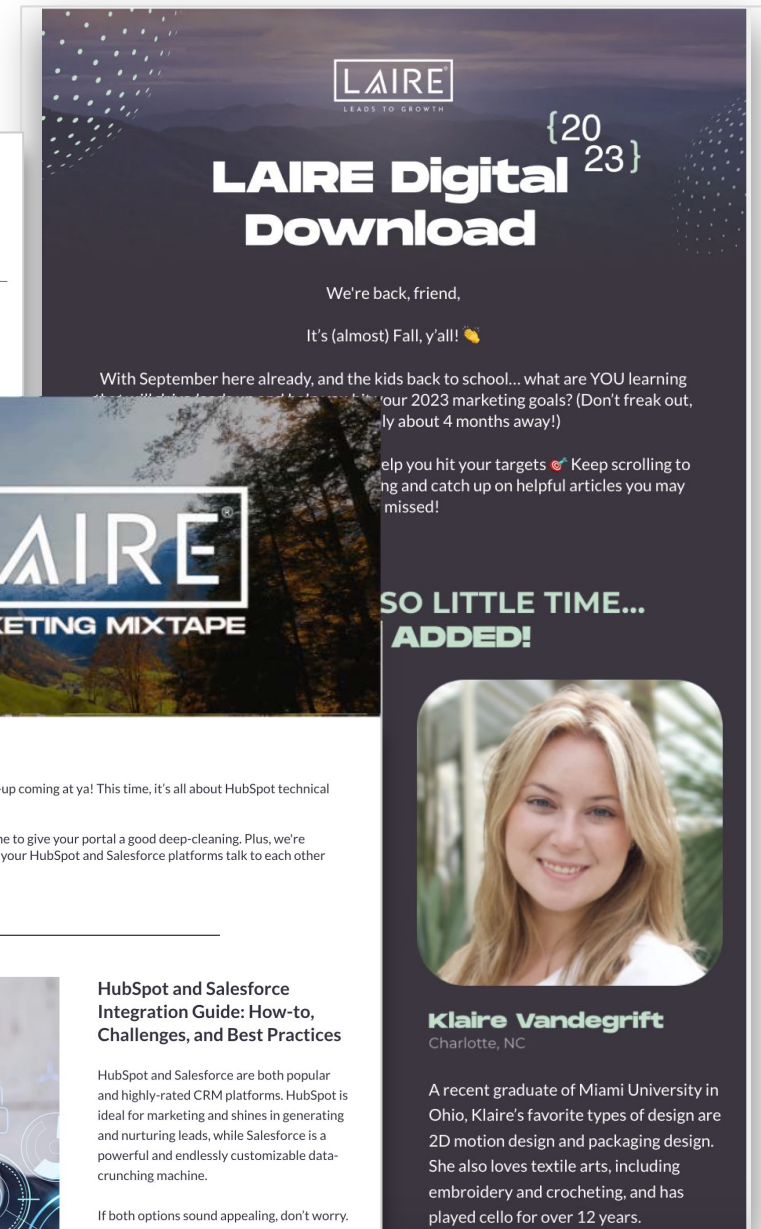
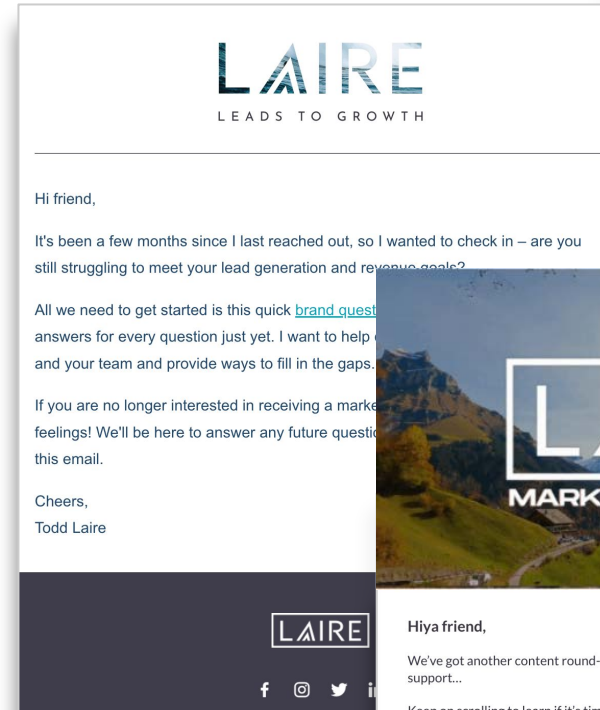
Segmented Interest Newsletters

Re-Engagements

Action Nurtures

- Emails triggered by an action of the user, like returning to your site

>> Email Segmentation Resource:
Supercharge Lead Generation Through Sales and Marketing Automation



AI PROMPTS

FOR NEXT LEVEL EMAILS

AI PROMPT:

Create a catchy, one-sentence email subject line for the following content that will resonate with [target audience]: [list email content].

AI PROMPT

Write an email about [subject matter] with the goal to [conversion goal] with [target audience].

AI PROMPT:

Take the following email copy and rewrite it with a [describe tone] tone: [list email content].

AI PROMPT:

Generate an email drip campaign strategy outline for [target audience] who just [triggering action] with the goal to [conversion goal].

AI PROMPT:

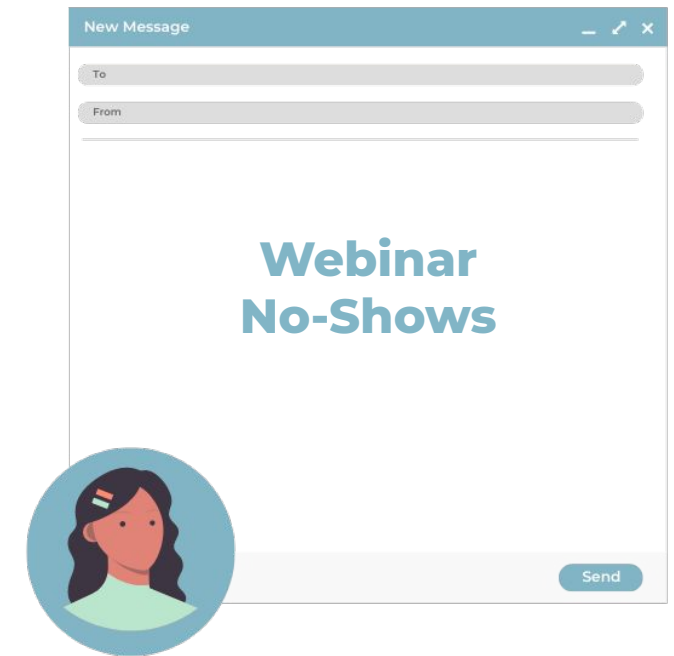
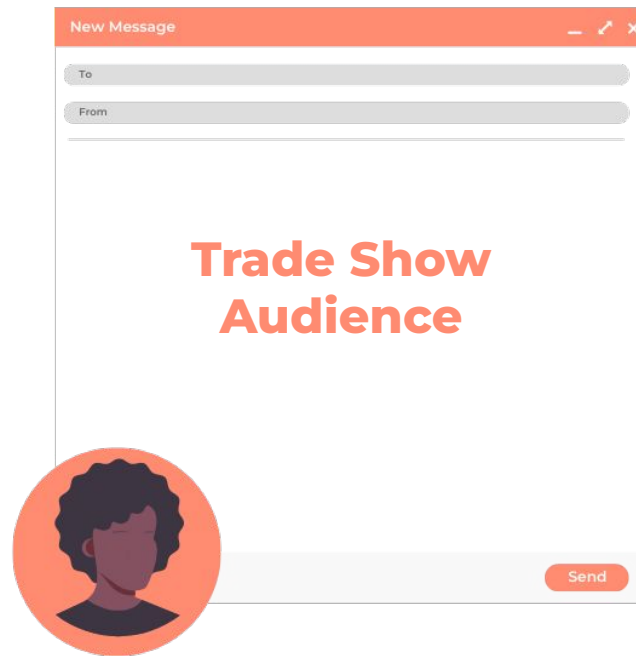
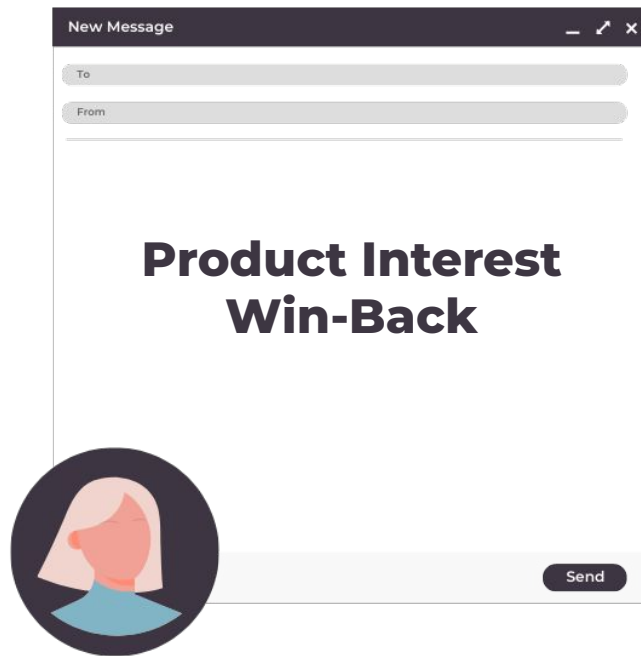
Create an email newsletter content plan that addresses topics that resonate with [target audience] in the [industry] industry.

AI PROMPT:

Draft a persuasive subject line and preview text for an email targeting [target audience] in order to [conversion goal].

EMAIL SEGMENTATION

✗ DON'T: Neglect your personas when it comes to email segmentation (industry, interest, demographics, firmographic)



DIGITAL ADVERTISING

Think beyond awareness ads.
Get more from your paid media.

DIGITAL ADS FOR LEAD GEN

- ✓ **DO:** Advertise content offers & downloads (+consults, trials, awareness)
- ✓ **DO:** Use in-channel lead gen tools (LinkedIn)
- ✓ **DO:** Go geo
 - Geotargeting (normal ads)
 - Geofencing & Geoframing (proximity marketing)



**AI
PROMPT:**

I want to promote [key products or services] to [primary goal] with [target audience]. Outline the best digital ad platforms I can leverage and what my budget should be.

RESOURCE

B2B MARKETER'S GUIDE TO LI ADS

- Creating LinkedIn ads
- Running ads on LinkedIn
- Creating a LinkedIn ads campaign
- Setting a budget for LinkedIn ads
- + Other LinkedIn social media marketing best practices

[>> Download Guide](#)



The background is a grayscale image of a person's hands typing on a laptop keyboard. Overlaid on this image are several semi-transparent digital icons: a checkmark in a circle, a bar chart with an upward arrow, and three interlocking gears. There are also some faint, abstract white lines and shapes floating in the air, suggesting a digital or automated environment.

AUTOMATION

Design an efficient lead gen
system with automation.

— ENGAGE WITH CHAT

LEVEL A: Live Chat

LEVEL B: AI Chat

*46% of users most likely prefer human customer agents even if chatbots saved 10 minutes.
(Usabilla)*

The screenshot displays a chatbot builder interface for a 'Lead Qualifying Bot'. The interface is divided into two main panels: a 'Build' panel on the left and a 'Get Name' settings panel on the right.

Build Panel:

- Welcome message:** A text bubble with the message 'Got any questions? I'm happy to help.'
- Get Name:** A text bubble with the message 'Great, a member of our team can get back to you. Before we get started, what's your name?'. Below this bubble is an action labeled 'Save response to Contact Name'.
- Get Email:** A text bubble with the message 'Finally, what's your email?'. A warning message below it states: 'This action and any if/then branches will be skipped if a property with this name already exists.'

Get Name Settings Panel:

- Action name (internal only) *:** A text input field containing 'Get Name'.
- Message *:** A text area containing the message 'Great, a member of our team can get back to you. Before we get started, what's your name?'. Below the text area are icons for text (A), list (ul), code (code), and a contact token (Contact token). A button '+ Add message bubble' is at the bottom.
- Your visitors' responses:** A section with a 'Quick replies' dropdown menu containing the text 'Start typing to add quick replies'.
- Save to HubSpot property *:** A section with 'Save' and 'Cancel' buttons.

— AI CHAT SCRIPT PLANNING BEST PRACTICES

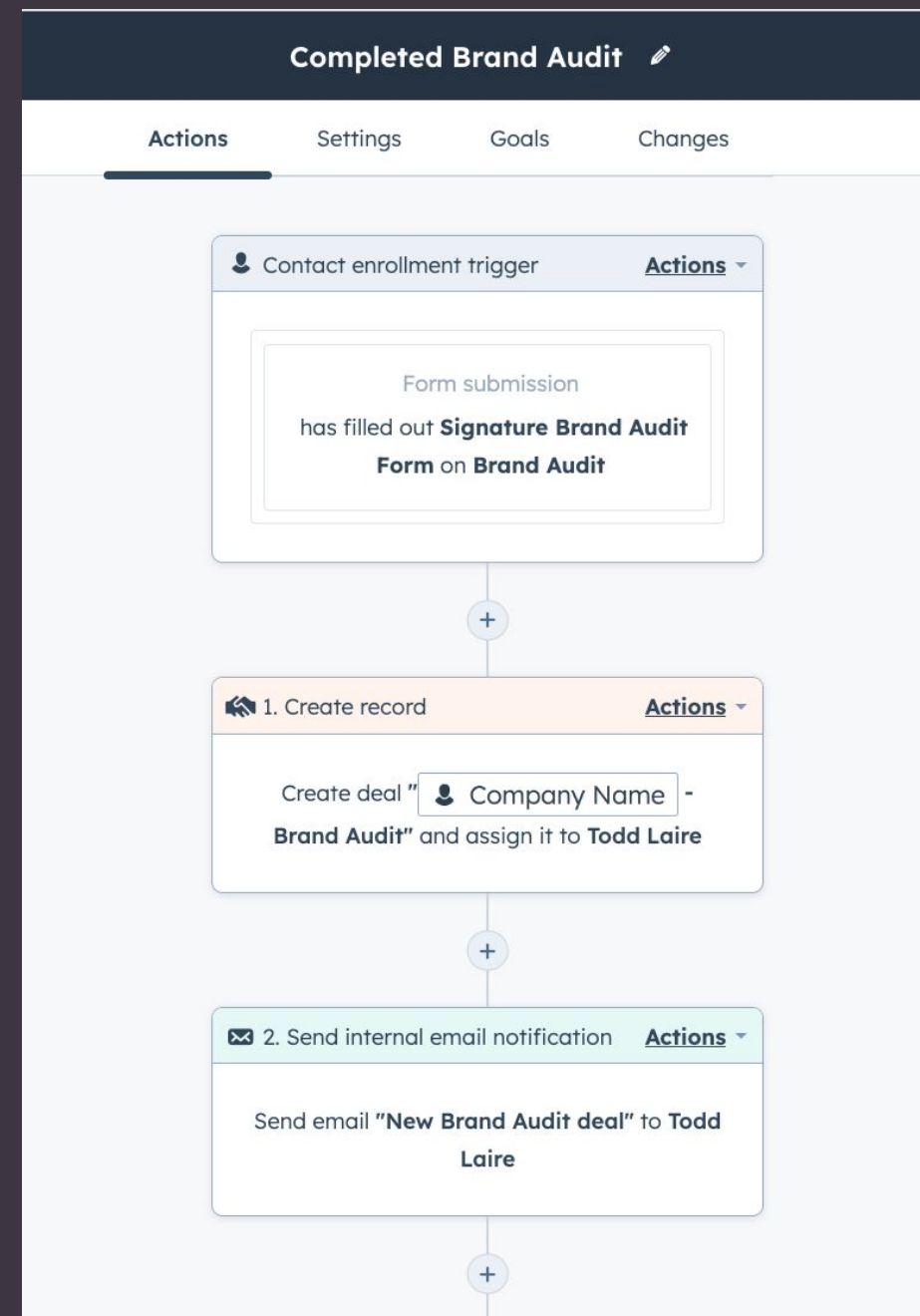
- ✓ **DO:** Use conversational language
- ✓ **DO:** Add emotional appeal
- ✓ **DO:** Set the appropriate tone of voice
- ✗ **DON'T:** Overlook interruptions and misunderstandings



AUTOMATING TASKS

A solid lead gen program is not without automation!

- Lead assignment to reps based on region
- 15/30/45 Page View Notifications
- Alert to internal team when a high intent lead completes a email nurture workflow



LEAD SCORING

The process of assigning a numerical value to each lead in your CRM, reflecting the lead's likelihood of becoming a paying customer.

- Brainstorm attributes that indicate whether or not a lead is sales qualified
- Provide a score for each attribute
- Confirm criteria with marketing and sales teams and finalize your list

>>[Lead Scoring Worksheet Resource](#)

Data Type	Criteria	Score
Enters HubSpot	Form Submission	50
	Live Chat	50
	Paid Social Lead Generation	50
	Webinar Registration	10
	Manually Entered by Sales Rep	50
Email Behavior	Open	5
	Click	10
	View Meeting Link	20
	Unsubscribe	-200
	Bounce	-200
Sales Rep Engagement	Meeting Outcome	N/A
	Scheduled	50
	Completed	30
	No Show	-50
	Canceled	-50

RESOURCE

34 AI PROMPTS TO SIMPLIFY YOUR MARKETING EFFORTS

- Learn why AI prompts are critical to streamlining your marketing tasks
- Get prompt ideas for strategy, website optimization, content marketing, SEO, social media, paid media, and email marketing
- See quick tips to keep in mind when using AI prompts

[>> Download Guide](#)





To get this presentation and more impactful marketing resources you can start using right now, visit:

www.lairedigital.com/convergesouth



LEADS TO GROWTH

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todd@lairedigital.com