

Sandy Martini Presents

# The Escalator™

HOW TO  
CREATE  
A FUNNEL



WHICH NURTURES YOUR CLIENTS  
& YOUR BANK ACCOUNT



[www.themartiniway.com](http://www.themartiniway.com)

# **The Escalator™**

## **WORKBOOK: How to Create a Funnel which Nurtures Your Clients and Your Bank Account**

**with Sandra Martini**

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## Welcome

You downloaded this report because you have an interest in Sales Funnels or, perhaps you're simply wondering what an "Escalator™" is.

Good news! The terms have similar definitions.

An Escalator™ incorporates everything that a Sales Funnel does. A Sales Funnel does NOT include everything an Escalator™ does.

You'll learn more about that in the next few pages. I coined the term "escalator" several years ago to describe the process of nurturing clients through the principles of Extreme Client Care™ as they move through your marketing process with the goal of not only attracting, but retaining them.

One of the most common questions I get is "Will this work for my business?".

The answer? Absolutely. I've partnered with coaches, consultants, naturopathic doctors, cancer treatment centers, real estate agents, a restaurant and even an auto repair shop to create Escalators™/Sales Funnels for their businesses.

The Workbook shares the steps needed to create your Escalators™, incorporating the principles of Extreme Client Care™ throughout the process.

Ready? Let's jump in!

Abundantly yours,

*Sandy* ☺

Sandra Martini  
Business & Client Care Advisor

## Escalators™ vs Sales Funnels

You may be familiar with the term "Escalator™" and never heard of "Sales Funnels" or vice versa. While they're very similar, there are a few important differences.

It's easiest to start with an overall definition and then go into the most significant difference between the two:

### Escalator™/Sales Funnel: A Definition

An Escalator™/Sales Funnel refers to the buying process that businesses lead customers through with the goal of purchasing programs, products and services. A true funnel or Escalator™ includes several steps and nurturing sequences, which can differ depending on the particular sales model. The steps are connected via an automated system.

Escalators™/Sales Funnels take a new lead by the hand (virtually) and introduce them to your business as they opt-in to your community ("join your list") and convert to a paying client.

Done well, your Escalator™ will convert:

- New leads to subscribers
- Subscribers to paying clients
- Paying clients to raving fans who stay and refer

It's divided into several steps including:

- ✓ Advertising (paid or unpaid) to drive traffic
- ✓ Opt-in registration page for new leads to join your community (see example at <http://www.TheMartiniWay.com/programdesign>)

- ✓ Thank you page for opt-in registration
- ✓ Free giveaway: report, video, audio, book, checklist, quiz, assessment, etc.
- ✓ Nurturing Sequence/Autoresponder delivered automatically via email service provider
- ✓ Low cost program, product or service (optional)
- ✓ Thank you page/process for low cost item (as needed)
- ✓ Nurturing Sequence/Autoresponder (follow-up of low cost program, product or service)
- ✓ Next level program, product or service, its thank you page, its nurturing sequence. . .and so on and so on.

The Escalator™/Sales Funnel can go on and on for as long as you'd like, linking to the next *logical* program, product or service that you offer.

"Logical" here is defined as a program, product or service which either complements or goes deeper on a topic than the one they already invested in.

For example:

- Free Giveaway: Ultimate Guide to Program Design & Upserving leads to
- Low Cost Product: \$7 Sales Page Checklist leads to
- Next Level Product: \$47 Step-by-Step Sales Page Creator

See how everything relates?

The Free Giveaway describes how to design programs your customers and clients want to buy. It's important that the Giveaway you're offering is full of value and helps your prospects get results.

The Low Cost Product then tells you what you need to have on your information/sales page in order to convert visitors into paying clients.

And the Next Level Product shares a step-by-step process to complete your entire

information/sales page.

That's what we mean by a logical progression in your Escalator™/Sales Funnel. Each program, product or services builds upon the previous.

Note that you don't need to offer the Low Cost program, product or service. You can provide more value before asking for a sale.

And the difference between an Escalator™ and how most define a Sales Funnel?

Extreme Client Care™ -- treating others better than they would treat themselves and doing it through every step of the process, whether they're a paying client yet or not.

What that means:

- If you chose (notice there was a CHOICE and it wasn't required) to give me your email and snail mail address, you received a 100% free, no sales pitch included USEFUL goodie in the mail with a letter on how to use it. That's Extreme Client Care™.
- If you snail mail a thank you, birthday, holiday, condolence or "just because" card. That's Extreme Client Care™.
- If you send (email is totally okay here) helpful bits of info via a personal note, with no ulterior motive. That's Extreme Client Care™.
- When (not "if") you unexpectedly overdeliver. That's Extreme Client Care™.
- If you focus on relationships and serving, knowing that revenue will follow. That's Extreme Client Care™.

## Building Your Escalator™

Building your first Escalator can feel overwhelming. Don't let it.

Unless you're new in business (in which case, [check out this free report](#)), you likely have most of the programs, products and services you'll need -- we'll get to that in a bit.

First up is to determine your ultimate goal:

- If you're a coach or restaurant, you're likely looking for repeat clients.
- If you're a cancer treatment center, ideally your patients will be cured and not need your services in the future so you're looking more for referrals.

In both cases, you want to create a funnel that's focused on customer experience or Extreme Client Care™.

Everything you do in setting up your funnel or escalator should be from that viewpoint. It's about helping people get results.

Knowing that we're exposed to about 4,000 pieces of information PER DAY, and 3,000 of that is commercial, your business needs to stand out -- kind of like being heard in a room where a teen is "playing" a new drum set.

How will you be heard?

The best way through is consistency and multimedia.

The most successful funnels have both:

- Repeatable lead generation process that typically involves social media, including paid advertising and, ideally, includes direct mail.
  - Note that Facebook recently announced a change to their algorithms

such that people will see info from their friends and family before business/community pages *unless* those pages are using paid advertising. No lead generation method stays free forever.

As you're likely aware, Gmail places most email newsletters in the "Promotions" tab underneath paid advertising of people often advertising the same thing you are. Again, the paid advertising goes to the top of the list and the unpaid is pushed down.

- Consistent communications with your community of prospects, paying clients and former clients.

Via our advertising (free or paid), we're looking to get an opt-in to a video, special report, checklist -- something that makes our prospects' lives easier or gives them a quick solution to a problem they have. Our goal is to build trust and create a favorable impression.

Once we have their contact info, we nurture them through automated email sequences and, ideally, direct mail. "Nurture", not hard-core sell. Treat others as you want to be treated.

Throughout this process, we offer different programs, products and services -- *based on the behavior* they've shown.

For example, if I have a special report on how to create irresistible, must-read-now headlines and you sign up for it, the nurturing sequence I send would include more tips about headlines and then progress to the natural next offer of my Step-by-Step Sales Page Creator.

And then, after providing additional value, the next natural offer would be my training on Creating Nurturing Sequences.

Make sense? And notice that the above (Headline Report to Sales Page Creator to Creating Nurturing Sequences) is different than the funnel I shared a few pages ago.

This is how you can create multiple Escalators™ by repurposing programs, products and services.

The key to this is your Product Organization Chart.

## Product Organization Chart

Begin by listing *everything* you've created in your business by name-- both free items and paid. Much of this is likely sitting on your hard drive or in Dropbox/Google Drive.

- Brochures
- Ebooks
- Programs
- Special reports
- Journals
- Group experiences
- Webinars/Webcasts/Teleseminars
- Podcasts
- Videos
- Books (hardcopy, Kindle, etc.)

- Anything else?

Grab a notepad and list or list below:

Put a number next to each of the items you listed above (#1, 2, 3, etc.). Now group your programs, products and services by category by entering the appropriate number into each box below (we're using the number system simply to conserve space).

So if you have a free special report that you do not require an opt-in for with the number 1 next to it, write "1" under the "100% FREE" column below. If you have a \$97 on demand video series with the number 13 next to it, you write "13" in the "\$51 - \$299" column.

100% FREE (no opt-in)	Behind Opt-in Wall	\$ Under \$51	\$\$ \$51 - \$299	\$\$\$ \$300 - \$999	\$\$\$\$ Over \$1000

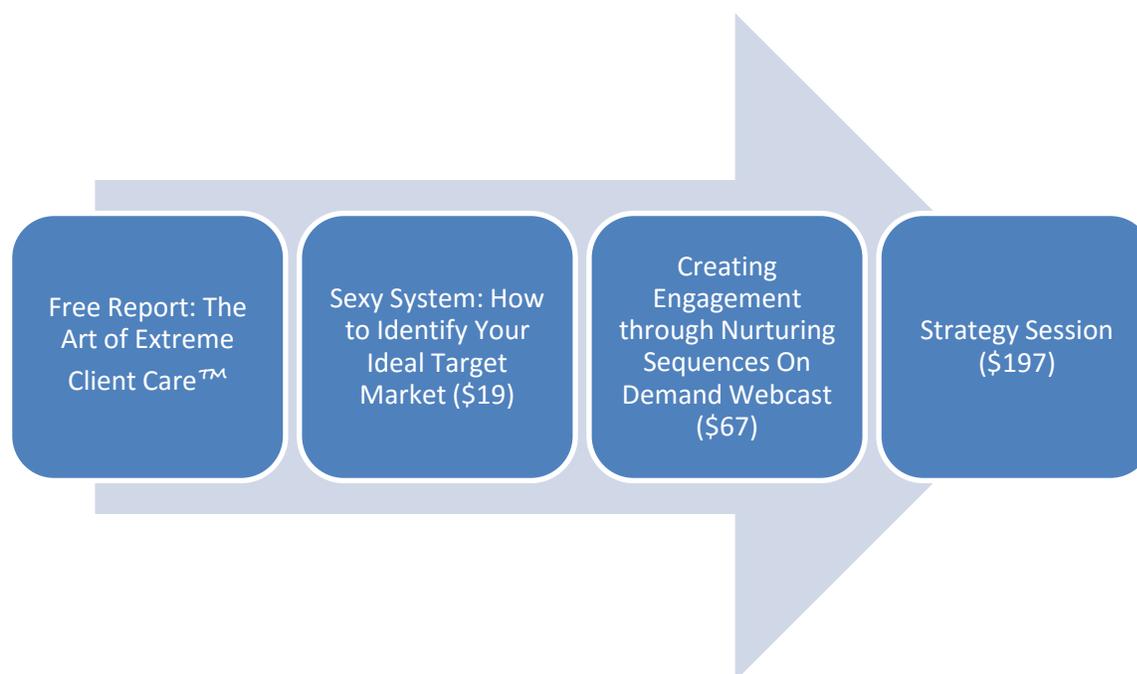
Put an asterisk by anything above that's not 100% complete. Make a note of it so you can get it on your calendar to finish based on your schedule.

Here's an example:

100% Free	Behind Opt-in Wall	\$ (under \$51)	\$\$ - \$\$\$ (\$51-\$299)	\$\$\$ - \$\$\$\$ (\$300-\$999)	Over \$1000
Blog, LI Pulse, FB Notes	Definitive Guide to Program Design	Sales Page Creator	Create Engagement	Book Launch Promotion Plan	Profit Partner
Overcome Overwhelm	3 Profit Strategies	SS: Content Marketing	Calendar System	Escalator Profits	Keep It Simple
Podcast	ECC ebook	SS: Ideal Clients	Escalator Mktg	SMAC	Virtual Day
Business Assessment	Overcome Overwhelm	Audit ebook	Maximize Your Conversions	Fly on the Wall	In-Person Day
5 Steps to a Real Business	Launch Plug-n-Play	GIDR		ECC Review	Outsourced COO/CMO
Ezine	Slides	Escalate!		Focused Consult	
Templates (S&M, etc.)	Webinars / Webcasts	Single quarter calendar system			
Slides	Templates	Speaker Pkg			
Speaking		Know Your #s			
Webinars / Webcasts / Videos					

Now it's time to create your Product Organization Chart™ – just like an Employee Org Chart, a Product Organization Chart™ shows the potential relationship between products.

Think of all your programs, products and services as pieces of a jigsaw puzzle and the Product Organization Chart™ puts those pieces together in a way that becomes a natural flow from free to XXX (“XXX” depends on your offerings).



The Free Report can go direct to any of the above products or programs OR it can go to the Target Market product and then from there to Creating Engagement and then the Strategy Session (or can skip Target Market or Creating Engagement altogether).

The items that naturally fit form the bones of your funnel. Next up is to identify any gaps, note what you can add that fits and then start filling out your funnel with nurturing sequences, social media content and promotional posts, etc.

For example, if you have a \$47 product that is a natural precursor to your \$1,000 product, you're missing something in the \$200 - \$500 range, and you need a free opt-in giveaway that leads to either a \$7-9 product (if you want to immediately sell) or the \$47 product.

It's about putting things together in such a way that your nurturing sequences (autoresponders delivered between actions) make sense based on what your client, customer or patient has already invested in/opted into and engaged with:

- Do they open your emails?

- Did they watch the video you sent?
- Did they click on the link in the email?

Sending alone means nothing. Your prospective client, customer or patient needs to engage with the material before moving to the next step.

If there's no engagement and you keep trying to sell, you'll tick people off and your reputation will suffer as your bank account remains empty. You must provide value and that **value must be recognized, engaged with and consumed.** If you're going to offer something for sale straightaway, after someone opts in, it's best to offer something in the \$7 - \$9 range. This is low enough that people new to you often don't mind "taking a chance". And the value should be at least 10x that because this is their first impression of your business.

After that, it depends on what you're offering. My funnel programs and products range from a single \$7 to a monthly recurring \$1,135. This excludes my private consulting and done-for-you services.

## **Building a Successful Escalator™: The Pieces**

You know that you don't want to come out of the gate yelling "BUY, BUY, BUY".

You've got a list of programs, products and services. And likely a list of partially-created ones that need completion.

You've created your Product Organizational Chart.

Now what?

Now we walk through a successful Escalator™ and identify all the pieces necessary to making it function.

Here's an outline of an initial Escalator™ for our [Get It Done Right Membership Community](#):



Two quick notes on the content shown above:

- The opt-in content comes from the course being sold for between \$7 and \$19.
- The \$7-\$19 course content comes from the Get It Done Right (GIDR) membership we're offering

This allows us to create our Escalator™ without having to create a lot of brand new content/products and gives the prospect a \*real\* experience of the content.

Notice that we're testing two different versions:

1. Immediately selling a \$7-\$19 course after opt-in vs
2. Not offering an immediate sale and selling via nurturing sequence

Let's look at #1 first: Immediately selling a \$7-19 course after opt-in. To do this, you'd need:

- Opt-in/Lead Generation Item: Easiest way to do this is to repurpose a piece of a larger, related program, product or service.
- Opt-in Registration page. You can see a sample at

[TheMartiniWay.com/programdesign](http://TheMartiniWay.com/programdesign) (this was created using [LeadPages](#))

- Thank You page (for after opt-in) which offers the \$7-\$19 course.
- [Shopping cart](#)/PayPal link to pay for the course.
- Thank you page after someone purchases the course.
- Way to deliver the course: Can use [LeadPages](#), [Shopping cart](#), [Ruzuku](#), or other email delivery platform such as AWeber, MailChimp, etc.
- Nurturing Sequence/Autoresponders for after they purchase the course (remember to include the original opt-in lead generation item).
- Nurturing Sequence/Autoresponders to deliver the original opt-in for those who did not purchase the \$7-\$19 course.

Then, the "Thank You" page for after they purchase the \$7-\$19 course can either offer the Get It Done Right Membership or can offer it via a second nurturing sequence -- notice that we're testing both.

When they invest in the Get It Done Right Membership, the next step will be a "Thank You" page specific to that program and a new, welcoming nurturing sequence.

#### Client Care Add-ons:

- Snail mail goodie if they provide their mailing address when first opting in (before purchase)
- Snail mailed "Thank you" card for each purchase
- Hardcopy Welcome Kit when they join Get It Done Right

Now let's look at #2: Selling via nurturing sequence rather than immediately. To do that, you'd need:

- Opt-in/Lead Generation Item: Easiest way to do this is to repurpose a piece of a larger, related program, product or service.
- Opt-in Registration page. You can see a sample at

- [TheMartiniWay.com/programdesign](http://TheMartiniWay.com/programdesign) (this was created using [LeadPages](#))
- Thank You page (for after opt-in) -- tells them that the opt-in item will be delivered via email
  - Way to deliver the opt-in item: Can use [LeadPages](#), [Shopping cart](#), [Ruzuku](#), or other email delivery platform such as AWeber, MailChimp, etc.
  - Nurturing Sequence/Autoresponders to deliver the original opt-in, provides value and offers the \$7-\$19 course
  - [Shopping cart](#)/PayPal link to pay for the course.
  - Thank you page after someone purchases the course.
  - Nurturing Sequence/Autoresponders for after they purchase the course

Then, the "Thank You" page for after they purchase the \$7-\$19 course can either offer the Get It Done Right Membership or can offer it via a second nurturing sequence -- notice that we're testing both.

When they invest in the Get It Done Right Membership, the next step will be a "Thank You" page specific to that program and a new, welcoming nurturing sequence.

#### Client Care Add-ons:

- Snail mail goodie if they provide their mailing address when first opting in (before purchase)
- Snail mailed "Thank you" card for each purchase
- Hardcopy Welcome Kit sent when they join [Get It Done Right](#)

You can add as many additional pieces as you wish, and I recommend you do, the above includes the basics.

## Resources for Building Your Escalator™

Personally, I use a combination of [LeadPages](#) and [KickstartCart](#) -- those 2 combined give me everything I need for a fraction of the cost of the larger platforms.

[LeadPages](#) allows you to create opt-in pages, thank you pages and information/sales pages in minutes using their templates. And the best parts are that:

- their templates integrate with KickstartCart for automated adding to database, opt-in giveaway distribution and email segmentation and
- they compare/compile data from all industries and show you the highest converting templates so you can use proven formats.

This one resource has saved me thousands of dollars in hiring web page designers.

[KickstartCart](#) is a shopping cart system and email delivery system in one. It links with LeadPages and PayPal (or your merchant account provider of choice) and allows email segmentation, auto unsubscribes, tagging and much more.

There are other systems such as ClickFunnels, but I haven't personally used them. InfusionSoft or Ontraport are larger, more expensive systems which can do the job.

To store my online trainings, I use [Ruzuku](#) which allows me to offer "on demand" or "drip" courses as well as host webinars and send emails directly to course participants. And, importantly, allows my clients the convenience of all their trainings being in one place with one login.

A huge mistake I see here is business owners thinking they can piecemeal something together by using a bunch of free tools. It rarely works as intended

and almost always takes more time to maintain than the cost of a system such as the one I use (combination of [LeadPages](#) and [KickstartCart](#)).

If you're just getting started, I'd recommend the lower end version of [KickStartCart](#) and the monthly investment of [LeadPages](#) (unless you're great at setting up website pages, then you can eliminate LeadPages).

## **Do's and Don'ts of Building Your Escalator™ and Sales Funnel**

Let's take a look at some of the "do's" and "don'ts" in creating successful funnels.

### **Do...**

Infuse your funnel with Extreme Client Care™. Every step of the way, ask yourself, "If I was going through this process, what would I like here?" and then go one step further. Surprise and delight your prospects and customers with things they don't expect, and importantly, that no one else does.

For example, when someone new joins my community (aka "list") and chooses (not required) to give me their mailing address, I send them a 100% free, nothing for sale, goodie in the mail. That goodie is branded, costs me less than \$1.00 including goodie, letter, envelope and stamp and because it's useful to them, is something they'll keep on their desks.

### **Don't...**

Slap something together and think if you drive traffic people will buy. You need to either have earned trust previously or build it now.

Note that you have almost instantly "earned" trust if you're referred by someone

they already trust. Make sense? If you like Joyce and Joyce tells you this is the best thing since sliced bread, you're more willing to give it a try.

### **Do...**

Continue to provide value after your prospect opts in and even more after they become a paying client. The most successful businesses focus on Average Client Lifetime Value, not one-off sales.

You can continue to provide value via surprise gifts, unexpected additional reports/templates/checklists, free upgrades, client-only specials/discounts, etc. Let your imagination fuel your actions.

### **Don't...**

Create a funnel where the first item for sale is under \$50 and the second item is over \$1,000. While it's not impossible for someone to go from a low-cost to a high-cost program, product or service, it's rare, especially in an automated funnel.

This is better done in a personal environment such as an event (attend for free and then be offered opportunity to join a mastermind for example) or a one-on-one conversation.

### **Do...**

Automate as much as possible without losing the personal touch.

What this means:

- Automate delivery of any digital programs, products or services using systems such as [KickstartCart](#), [Ruzuku](#) and [LeadPages](#). If someone opts in for your doohickey at 3am, they should receive it by 3:05am. Note that I do

*not* recommend putting the download file on your "thank you" page -- we want people to get used to opening your emails, so include any download links there.

### **Don't...**

Go cheap. Invest in your funnel and it will pay you dividends far into the future. Go cheap and you'll spend your time chasing your hodgepodge of systems and, equally as bad, not provide your clients the personalized (even though it's automated) experience which will keep them coming back for years to come.

### **Do...**

Nurture. So many people preach the "set up funnels and make money" and that's possible, but if you want long-term client retention and referrals, you want to set your Escalators™ up in a way which nurtures and builds relationships. Doing that, my business enjoys a 94% client retention rate for 4 years and counting.

### **Don't...**

Suffer from shortsightedness. Focusing solely on the money rather than the relationship.

Someone sees your post on Facebook, they click it, you offer a 1-page checklist, they opt-in and then you immediately offer them a \$297 course. This fails most of the time.

You may be thinking "hmm, most of the time", the rest of the time I can generate \$297. True, but that's shortsighted. Focus on giving value first and you'll generate more goodwill, and revenue, over the long term.

That said, you could offer a \$7 more detailed checklist and a percentage of people will purchase -- you just need to ensure that this \$7 product, the first thing they're buying from you is worth at least 10x that. This is their first impression of your business -- make it good.

## Final Words

We've covered a lot in this Workbook and you now have the knowledge to put together your own Escalator™.

Just be certain that you "fill in" all the between spaces with Client Care. Think of your programs, products and services as the outside of the house and your Client Care Systems as the insulation keeping everyone warm and happy on the inside.

Note that you will not create one Escalator™ and be done. The more you create, the more stable your revenue will be and, quite frankly, the better experience your clients, customers or patients will have as you'll always have an answer to their "What next?".

Get off the revenue roller coaster -- no more wondering if you'll have clients next month or scrambling to pull a launch together and have the next 3 months depend on its success. Imagine the relief of knowing that clients will come, they will stay, they will pay AND they will have a great experience.

That's what a properly set up Escalator™ gives you.

The goal is to get started. You can create the beginnings of your funnel with the opt-in and nurturing sequence while you're building the rest. Always remember, done is better than perfect and it's okay to start small with a 2-3 step funnel and build it out over time.

If you have any questions or would like to chat, please email me directly at [Sandy@TheMartiniWay.com](mailto:Sandy@TheMartiniWay.com)

## About the Author

There are lots of things I could share with you.

We could discuss my primary educational background -- a dual Bachelors in International Relations and Russian Language with minors in Natural Resource Economics and Mandarin Chinese and all the courses for an Accounting degree -- but that's not really relevant to what we're doing here.

More relevant would be my work experience:

- 3 years in Peace Corps Marketing Department
- 5 years with the Community for National & Community Service (AmeriCorps, VISTA, ACTION) first in the Marketing Department handling the nationwide launch of AmeriCorps and White House Presidential events and then in the Finance Department managing the Agency's budget as part of a 2-person team.
- 7 years as a Senior Director of Operations for a national satellite television company managing everything from dealer commissions and programs to accounts payable and receivable.

Most relevant however would be the last 11 years of running my own successful business. What success means to me and where my business currently is:

- spent the majority of 2016-to-date as a full-time caregiver for first my sister (metastasized breast cancer) and then my mother (lung cancer) and growing the business 11% during that time due to the systems and Escalators I've put in place
- working in/on the business 4 days/week and taking one week per month to focus on my writing projects
- business fully "funds" my life (no additional income aside from what business generates)
- surrounded by a fabulous team (2 part-time virtual assistants with different skill sets) who help me get things done
- blessed with clients I love working with and who regularly refer other clients to me
- 38% of current revenue is from continuity revenue of which 90% of members have been with us for over 5 years

- working from home with our "children" -- 2 dogs and 3 cats rescued from local shelters -- 2 of which are usually at my feet
- having plenty of time to focus on my hobbies and interests (gardening, natural health, raw foods, marketing. . .the list goes on :-)
- and always walking into the office (a spare bedroom) with a smile grateful for the ability to do what I do with the clients I do it with

and the fact that I partner with you to show you how to create your version of success.

My mission is two-fold:

1. Support businesses which make a positive difference in the world, creating a ripple effect of good and
2. help you create a business which not just allows you to live life on your terms, it fully supports it.

If you have any questions or would like to chat, please email me directly at [Sandy@TheMartiniWay.com](mailto:Sandy@TheMartiniWay.com)



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