



SALES & MARKETING

Jed Reitler

Dec 2014

Overview

S + M Process

S + M Plans Overview

Plans for Growth

Sales

Metrics

Research

Value Proposition



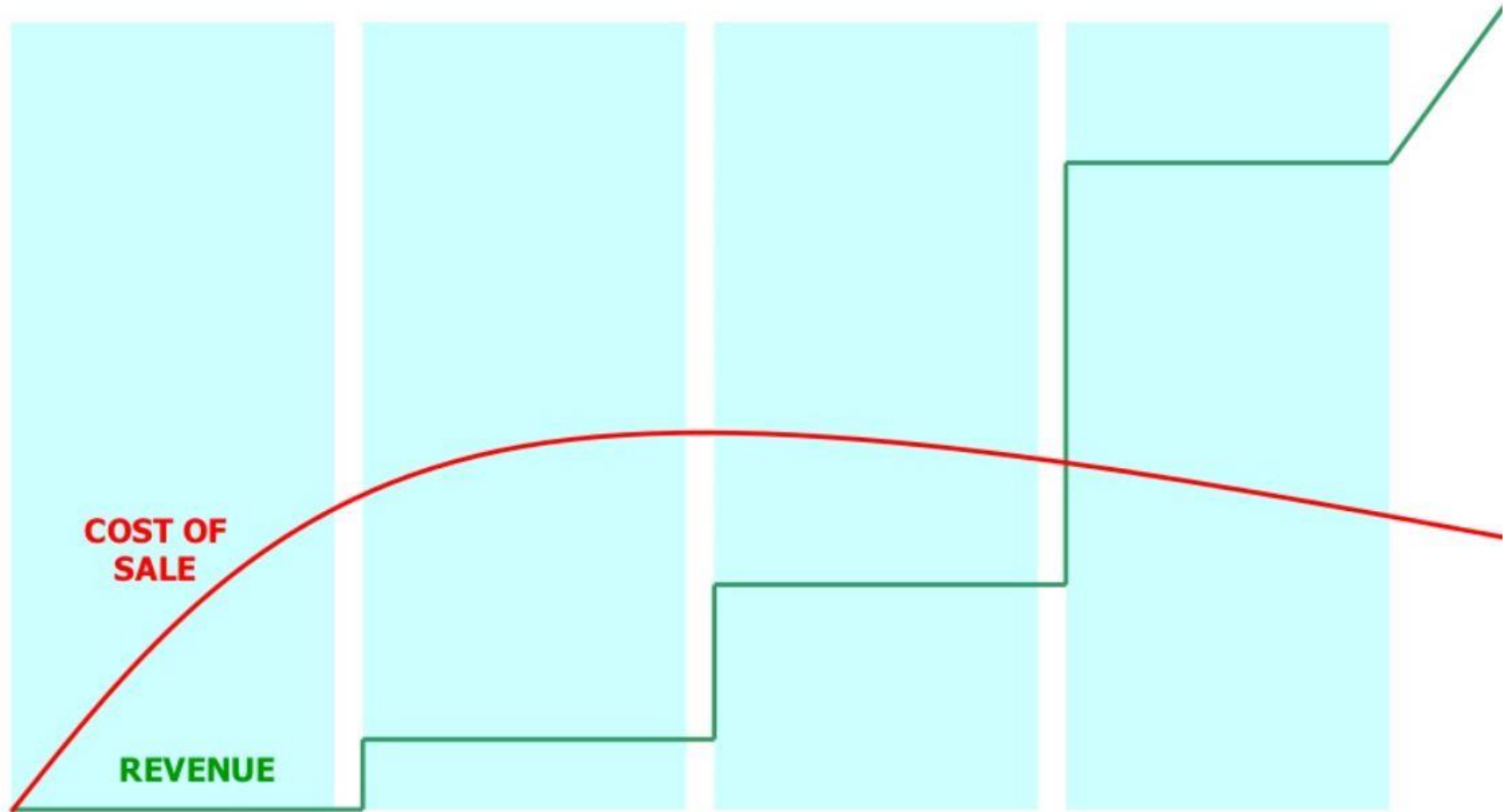
Inflection Point

P0: Evaluation

P1: Validation

P2: Initial Rollout

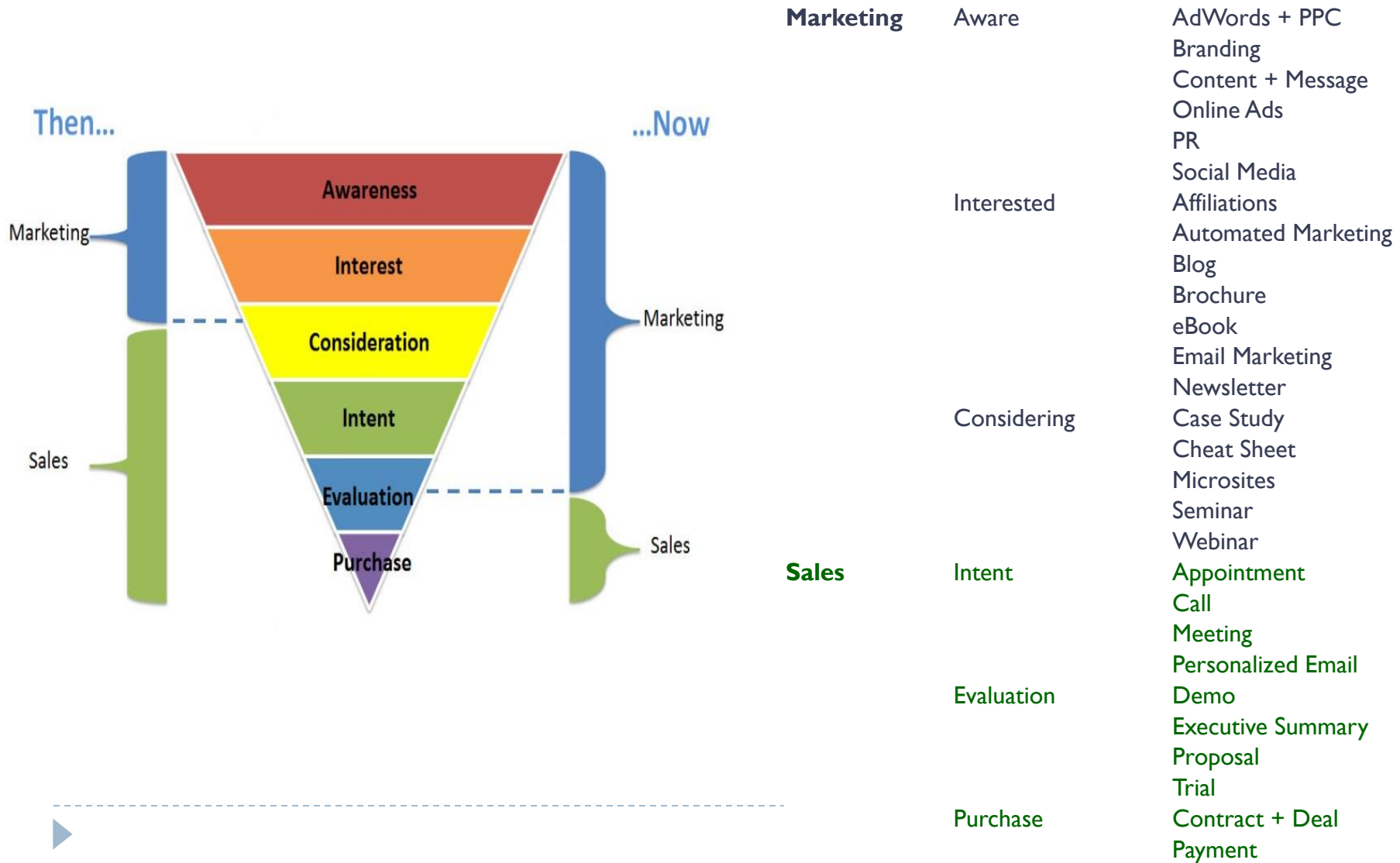
P3: Enterprise Rollout



What LienApp™ Doesn't Need



Process



Marketing Plan



Research	Value Proposition	Digital Marketing	Systemize
Targets by channel	Aware, Intent, Desire	Social prospecting	Templates
Client profiles (Ideal)	Educate and consult	Landing pages	Tools
Key drivers	Brand + MarComm	Blog	Processes
Market potential	Message by channel	Newsletter	Feedback Loops
Economic factors	Think, Feel, Believe	Automated email	Brand Consistency
Regulatory factors	Elevator Pitch	eBooks	Content dissemination
Target touch points	Brand extension	Ads and PPC	Automation
Cost-effective Mktg			



Sales Plan



Prioritize + Prospect	Qualify	Convert	Systemize
Market analysis	Needs awareness	Calls and emails	Activity plan
Potential by channel	Sophistication sense	Follow-up routine	CRM tracking
Affiliations, referrals	Valuation and Qty	Competitive advantage	Metrics
Social media	Solving problems	FUD	Feedback Loops
Strategy by channel		Loyalty and referral	Automation
Strategy by life stage			Business process
Build the pipeline			Internal comms





Details

Deeper Dive

Goals

- ▶ **5,000 Targets**
 - ▶ All market segments
 - ▶ 2% marketing conversion
 - ▶ 2% sales conversion
- ▶ **200 Leads**
 - ▶ 25% sales conversion
- ▶ **50 Potentials**
 - ▶ 10% to 20% team conversion
- ▶ **5 to 10 Deals**



CY15 Quota \$250,000



Metrics

▶ Marketing

- ▶ Reach
- ▶ Response
- ▶ Lead Generation

▶ Sales

- ▶ Activities
- ▶ Prospect Conversion
- ▶ Cycle Time
- ▶ Pipeline
- ▶ Forecast
- ▶ Win Rate



Plan for Growth

Low-Cost Scalability

Plan for Growth

Repeatable Process

Share Information

Analyze Metrics

Gain Flexibility

Expand Reach

Reduce Redundancy

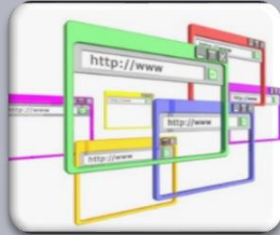
Reduce Errors

Brand Leadership

Scale Growth



Free Tools



Marketing Build

- ▶ **Blog**
 - ▶ RSS, Subscribe, Images, Comments
- ▶ **Other Blogs**
 - ▶ Comment, Discussion, Forums
- ▶ **Newsletter**
 - ▶ Information, Value
- ▶ **Automated Email**
 - ▶ Personalized Thanks, Value, Offerings
- ▶ **eBooks**
 - ▶ Leadership, Influence, Resources
- ▶ **Press Releases**
 - ▶ Updates, Events, Contact Information
- ▶ **Landing Pages w/ Analytics**
 - ▶ Brand, Tracking, Personalization
- ▶ **Social Media**
 - ▶ Connections, Interactions, Prospecting
 - ▶ LI, Tw, G+, FB, SS, Pin, YT, Pin, Inst

- ▶ **PPC**
 - ▶ Google AdWords
- ▶ **Online Ads**
 - ▶ NTLA, TSR
- ▶ **SEO**
 - ▶ Blogs, Social, Referral Links
- ▶ **Webinars**
 - ▶ WebEx
- ▶ **Events**
 - ▶ Conferences, Trade Shows

Mobile-Friendly



Marketing Integration

VADAR Value Proposition

Website

MarComm

Blog

Press
Releases

Expand Digital Marketing

Auto Email

eBook

Microsite

Newsletter

Social Media

Paid Promotion

Ad

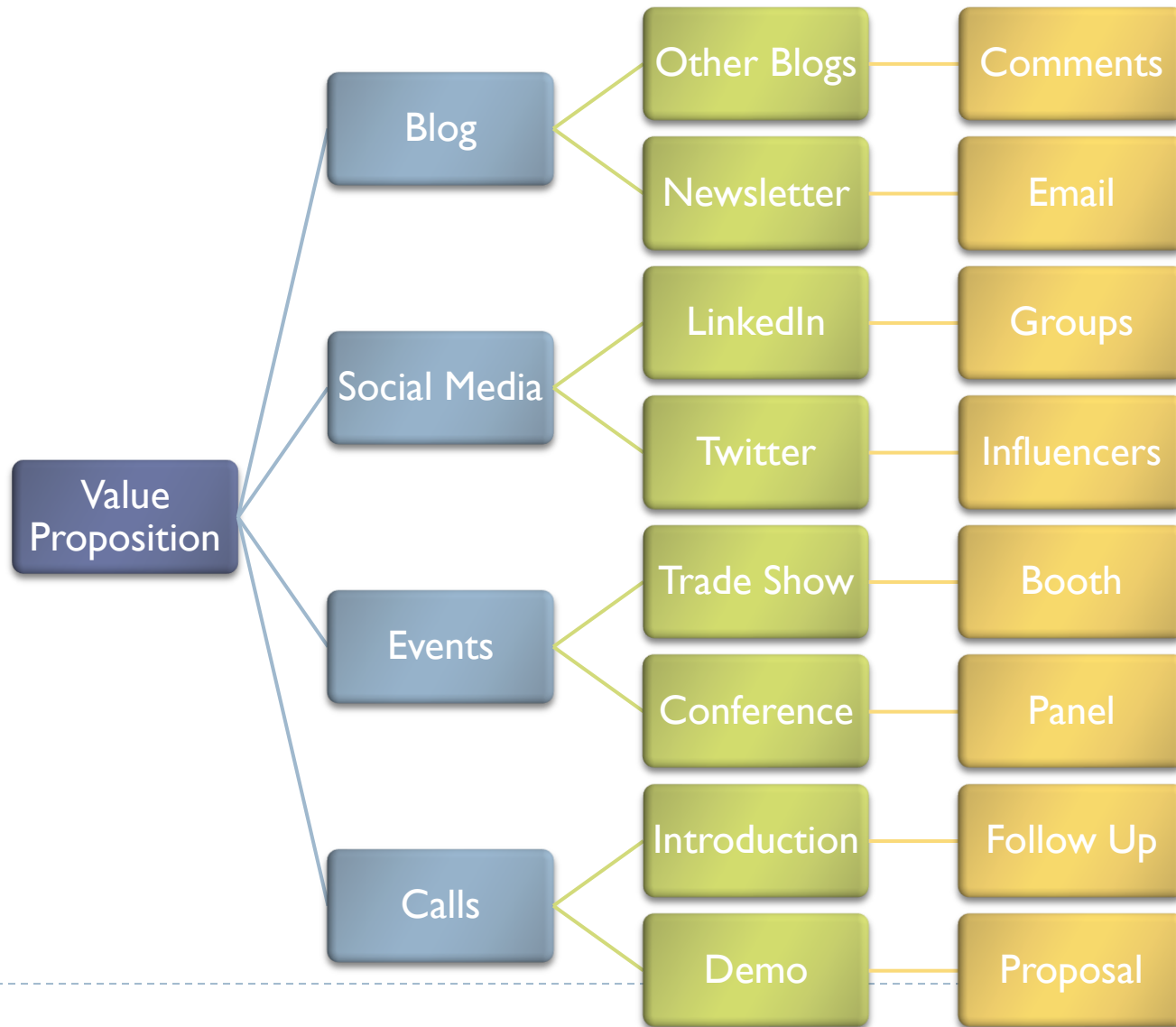
PPC

Webinar

Event



Content Distribution



Return on Mktg Invest (ROMI)

Subjective

- ▶ Brand Equity
- ▶ Placements
- ▶ Impressions
- ▶ Followers
- ▶ Attitude
- ▶ Fans
- ▶ Clicks

Quantitative

- ▶ **Leads** Generated
- ▶ **Prospects** Converted
- ▶ Pipeline Gap
- ▶ **Demos, Proposals**
- ▶ **Sales, Revenue**
- ▶ **Revenue to Cost**
 - ▶ By Activity, Channel



Tool Assessments

Current	Issue	Recommend	Compared	Price
Prospecting		Zoho	12	\$130
Scheduling		Outlook		\$0
Task Mgmt		Outlook		\$0
Mktg Tracking		Zoho		\$0
Click Through		AdWords		\$0
Mobility		Zoho		
Newsletter		MailChimp		\$0
Activity Tracking				
Conversation Log		Zoho		
Pipeline		Zoho		
Forecast		Zoho		





Sales

Actions and Results

Prospecting

Today 90% Word of Mouth

- ▶ Monthly Newsletter
 - ▶ Blog, Email, Mail, Social Media, Channels
 - ▶ Comment on Leading Blogs
 - ▶ Investment Community
 - ▶ Speaking Engagements
 - ▶ Real Estate Attorney Groups
 - ▶ Online Advertising
 - AdWords, NTLA, Real Estate Investors, Attorneys, etc.
 - ▶ Prominent Groups
 - ▶ Cold Calling
 - ▶ Email Lists
 - ▶ Referrals
 - Attorneys
 - Custodians
 - Data Providers
 - Municipalities
-
- ▶

Sales Activity to Pipeline

- ▶ **Targets**

- ▶ Auto Marketing, Blogs, PPC, Website

- ▶ **Leads**

- ▶ Association, Email, Group, LinkedIn, News

- ▶ **Prospects**

- ▶ Phone Call, Lead Conversion

- ▶ **Bids / Potentials**

- ▶ Demo, Trial, Quote, Negotiate, Close

- ▶ **Clients**

- ▶ Onboard, Relationship, *Delight*, Loyalty



Sales Qualities

- ▶ Personable, building trust
- ▶ Aggressive with energy
- ▶ Active listening
- ▶ Probing questions to find pain points
- ▶ Consultative and educating
- ▶ Creativity over product knowledge
- ▶ Creates value for customers



Sales Activity to Channel

- ▶ Buyers
- ▶ Banks/Lenders
- ▶ Money Managers/Private Equity
- ▶ Consultants/Wealth Advisors
- ▶ Servicers
- ▶ Custodians
- ▶ Data Providers
- ▶ Municipalities



Sales Activity: 30 Days

- ▶ Account Segmentation
 - ▶ Ideal Customer Profiles and Value Propositions
- ▶ Lead Management
 - ▶ CRM Infrastructure and Data Population
- ▶ Immerse in Industry
 - ▶ Research, Blogs, Discussions, Forums, Videos
- ▶ Meetings with VADAR Principals
 - ▶ Approaches, Perspectives, Methodologies, Priorities
- ▶ Prospect Existing Leads
 - ▶ Onboard Relationships and Last Status, Calls, Emails
- ▶ Account Introductions: ProCap and Vidon
- ▶ Prospect New Leads
 - ▶ Social Prospecting, Fact Finding, Calls, Referrals
- ▶ Join Associations, Groups, Memberships
- ▶ Demo Familiarization



Sales Activity: 60 Days

- ▶ Prospect New Leads
 - ▶ Social Prospecting, Fact Finding, Calls, Referrals
- ▶ Lead Management
 - ▶ CRM Data Improvements and Reporting Analysis
- ▶ Optimize Route to Market by Channel
- ▶ Continue Account Relationships
- ▶ Improve Demo Use and LienApp Particulars
- ▶ Review Activity Levels and Adjust as Needed
- ▶ Review Actual vs. Plan and Adjust



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General Discussion Board

The Tax Sale Resources discussion board is the perfect tool for tax lien and/or tax deed investors to talk about their experience, ask other investors questions and even speak directly to the State Specialists at Tax Sale Resources.

If you can not find the right discussion, [start a new one](#).

Interact Within Influential Boards and Forums

Login

Current Discussions

Subject	No. of Entries	Date Started	Last Entry
how do I find the address when only the legal address is listed?	1	06/02/2013	06/02/2013
Tax lien certificate to sell	1	03/28/2013	03/28/2013
Tax Liens with Celltowers and Billboards	2	01/27/2013	03/20/2013
Redemption times for each state	1	02/13/2013	02/13/2013
I'm looking only for specific towns in the Maricopa sale	1	02/06/2013	02/06/2013
Tax Liens Portfolios in Florida	1	01/27/2013	01/27/2013
Due diligence when out of country?	3	01/06/2012	12/23/2012
Hands-on Investment Training	29	08/14/2010	12/04/2012
Reassigning Tax Certificate to the Bank	2	07/26/2012	08/22/2012
Tax Liens & Deeds	1	08/22/2012	08/22/2012
Lending Against Tax Certificates	1	08/15/2012	08/15/2012
Over the counter Tax Lien Certificates	27	05/14/2009	06/30/2012
buying properties	2	05/08/2012	05/30/2012
New York Counties with Tax Lien Sales	1	05/30/2012	05/30/2012
Bankruptcy	2	03/05/2012	04/11/2012
looking for investors	1	03/18/2012	03/18/2012
PIP-West Tax Agent Feedback	3	07/15/2011	03/05/2012
Want to purchase aftermarket liens TODAY	1	03/02/2012	03/02/2012
Code Enforcement Liends	1	03/02/2012	03/02/2012
Foreclosed house in Anderson Indiana as investment project	2	01/31/2012	01/31/2012
online tax deeds	1	12/24/2011	12/24/2011

TAX LIEN SERVICING SOFTWARE

CLOUD COMPUTING TECHNOLOGIES

CUSTOM DATA ENVIRONMENTS

IT SOLUTIONS & ASSISTANCE



LEARN MORE!

VADAR Systems

20 MAIN STREET,

LienApp™ Service Suite

Lowering Costs and Raising Returns

Elevator Pitch

Don't let overhead ruin your returns. Optimizing tax lien portfolio returns requires MORE than due diligence and best deal acquisition. **Too many portfolios rely on spreadsheets, tables, or home-grown programs.** These not only limit returns, they reach a growth limit, cost more to administer, and

Client Benefits

Know Your ROI. Have your exact cash flow, float, IRR, and ROI at your fingertips. With LienApp™ from Vadar Systems, you get precise IRR, redemption workflows, automated business rules, and ...

Reduce Your Overhead. Stop wasting money on inaccurate, limited tools that cost you more overhead as your investments grow. LienApp™ lets you take back the overhead opportunity costs to focus on your due diligence and acquisition strategies that set you apart.

Invest Across State Lines. Don't get stuck in one state. LienApp™ service software processes any tax lien state.

Qualifying Questions

How accurate is the ROI of your portfolio?

Do you have too many complex deals and paperwork?
Have you had it with spreadsheets and mail merges?

Do your costs increase as your portfolio grows?

Is your admin costing you time better spent elsewhere?
Do you want a system with built-in rules and automation?

Pain Points

Tracking headaches. Overhead costs. Opportunity Cost of Due Diligence. Limits of Spreadsheets and Mail Merges. Overwhelmed by tracking notices, legal docs, images, workflows. I-State Lock. Redundant data entry. Scattered systems.

	LienApp™	LienLog	LMS - LienQuest	Lumentum	PreLien2Lien	Tradition	ESC - dESCO
Tool							
Service							
Value							

Competitor Comparison

210% Portfolio Growth in 2 Years with ___% Cost Increase.

Case Study #2.
Case Study #3.

Case Studies

Lead to Onboard Process



	Marketing	Sales	Develop	Ops	Legal	
Lead Gen						
Qualification						
ID						
Demo						
Proposal						
Agreement						





Metrics

Feedback to Improve

Metrics

▶ Marketing

- ▶ Reach
- ▶ Response
- ▶ Lead Generation

▶ Sales

- ▶ Activities
- ▶ Prospect Conversion
- ▶ Cycle Time
- ▶ Pipeline
- ▶ Forecast
- ▶ Win Rate



Marketing Metrics

	Blog	Email	eBook	News	Webinar	PPC	TSR Ad	NTLA	Referral
Marketing Reach by Channel									
Impressions									
Click Throughs									
Website Visits by Source									
Campaigns, Referrals, Email, NTLA									
Social, PPC, Blog, Direct Traffic									
Leads Generated by Source									
Campaigns, Referrals, Email, NTLA									
Social, PPC, Blog, Direct Traffic									
Clients Sourced by Marketing									
% Clients from Marketing									
Visit to Prospect Performance									
% Prospects from Visits									
Prospect to Client Performance									
% Clients from Prospects									
Top Campaigns									
Success Stories									
Best Practices									
Market Penetration									
Market Share vs. Competitors %									
Market Contribution %									
Clients (Customers)									
Customer Experience (Sat, Retention)									
Loyalty %									
Channels									
Expense / Revenue by Channel									
Channel Mix									
Channel Performance to Plan									
Value Propositions									
Win Ratio									
Competitive Replacement									
Margin % Trend									



Sales Metrics

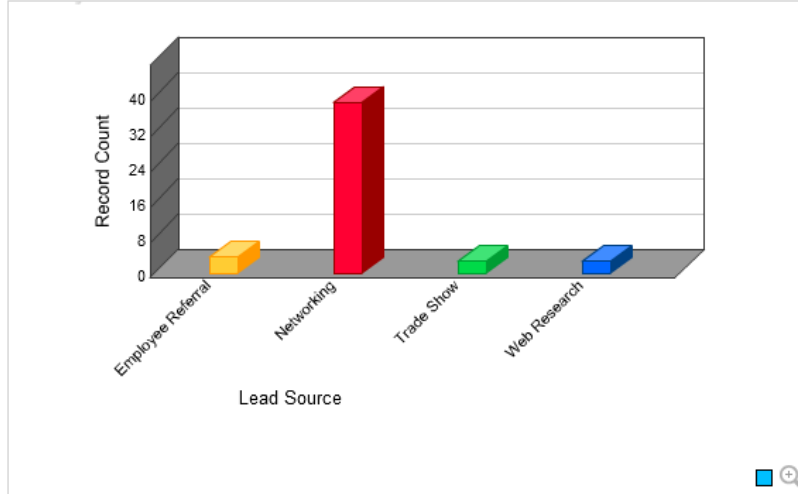
	Cold Call	Warm Call	Cold Email	Warm Email	Convers	Appmt	Demo	Proposal	Close
Activities to Plan									
Separate calls from conversations									
Granular CRM tracking for improvement									
Conversion Rates									
Calls to Conversations									
Emails to Conversations									
Sales Cycle Time									
From Lead to Client									
Time to Cash									
Time to Respond									
Actual									
Perceived (Survey)									
Client Scheduling									
% Appointments Kept									
% Demos Kept									
Win Rate									
% Demos to Proposal									
% Proposals to Contract									
Cross-Selling									
Additional Features/Services Sold									
Average Deal Size									
Sales and Marketing Funnel									
ARPU									
CAC									
ROI by Lead Source									
Total Touches by Account									
Pipeline									
Gap (Target - Current)									
Forecast									



Lead Metrics

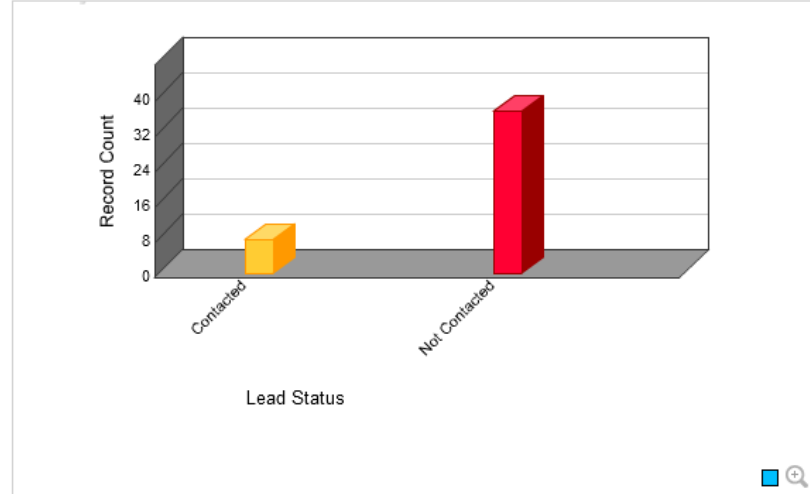
Leads by Source

Edit | Del



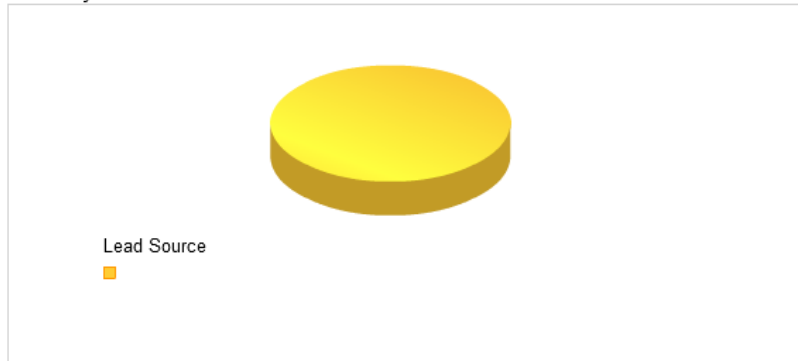
Leads By Status

Edit | Del



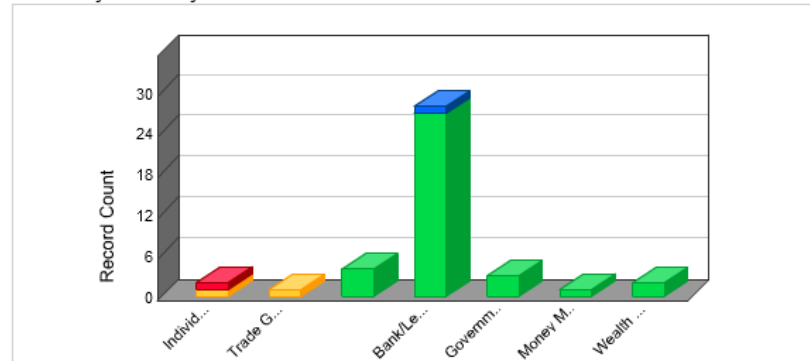
Sales By Lead Source

Edit | Del



Leads by Industry

Edit | Del



Pipeline

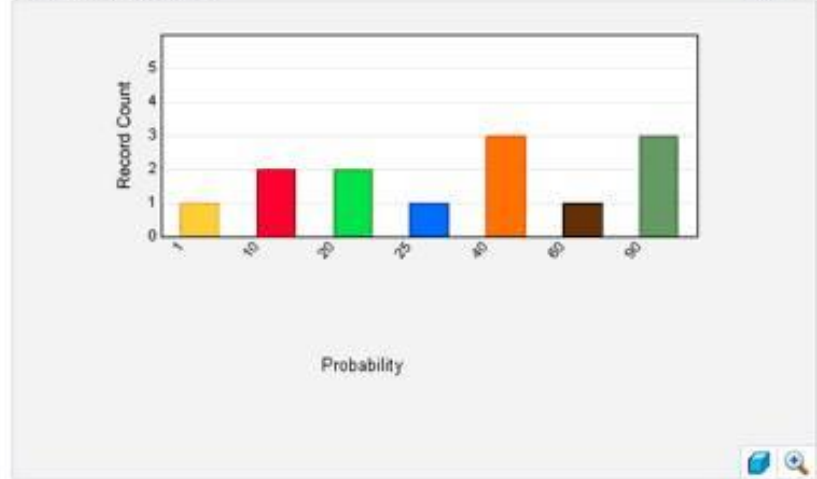
Pipeline by Stage

Edit | Del



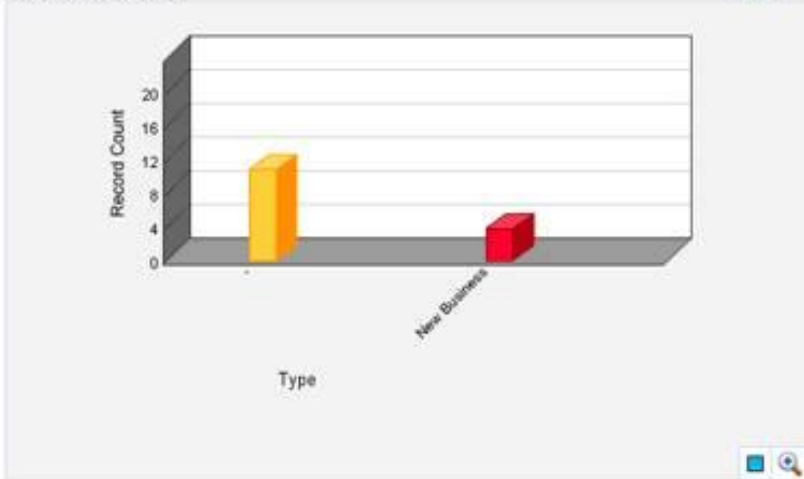
Pipeline by Probability

Edit | Del



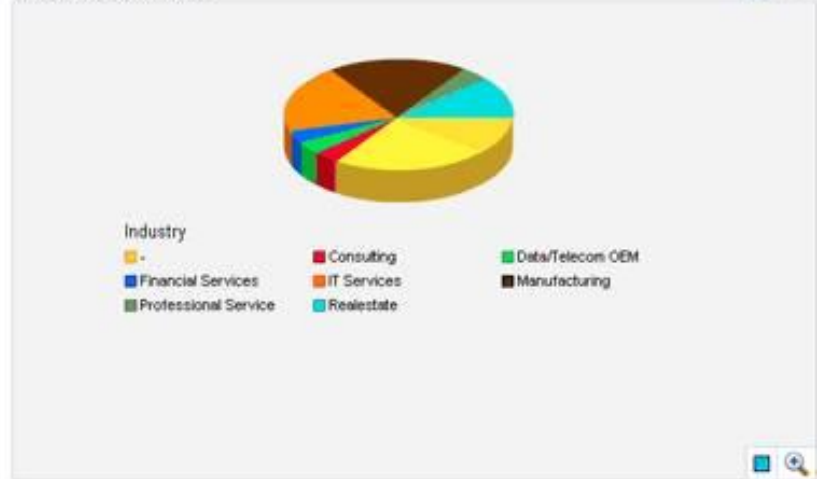
Potentials by Type

Edit | Del



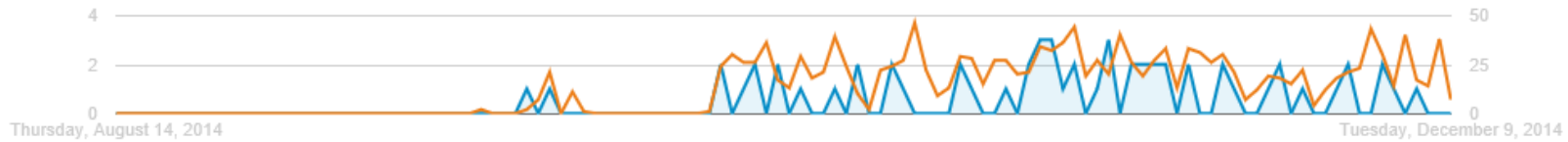
Accounts by Industry

Edit | Del



AdWords

Clicks vs Impressions



<input type="checkbox"/>	<input checked="" type="radio"/>	Ad	Campaign	Ad group	Status [?]	Labels [?]	% Served [?]	Campaign type [?]	Campaign subtype	Clicks [?]	Impr. [?]	CTR [?]	Avg. CPC [?]	Cost [?]	Avg. Pos. [?]
<input type="checkbox"/>	<input checked="" type="radio"/>	Tax Lien Software Enterprise Solutions Optimized For The Cloud. Maximize Revenue Now. www.vadarsystems.com/	Google Build	Tax Lien Software	Approved	--	41.22%	Search Network with Display Select	All features	39	1,016	3.84%	\$3.91	\$152.41	2.4
<input type="checkbox"/>	<input checked="" type="radio"/>	Tax Lien Software Optimize Your Portfolio Efficiency. Intelligently Guiding Our Clients. www.vadarsystems.com/ (mobile)	Google Build	Tax Lien Software	Approved	--	12.82%	Search Network with Display Select	All features	12	316	3.80%	\$3.86	\$46.35	1.7
<input type="checkbox"/>	<input checked="" type="radio"/>	Tax Lien Software Optimize Your Portfolio Efficiency. Intelligently Guiding Our Clients. www.vadarsystems.com/	Google Build	Tax Lien Software	Approved	--	9.86%	Search Network with Display Select	All features	8	243	3.29%	\$3.87	\$30.94	3.0



Market Research

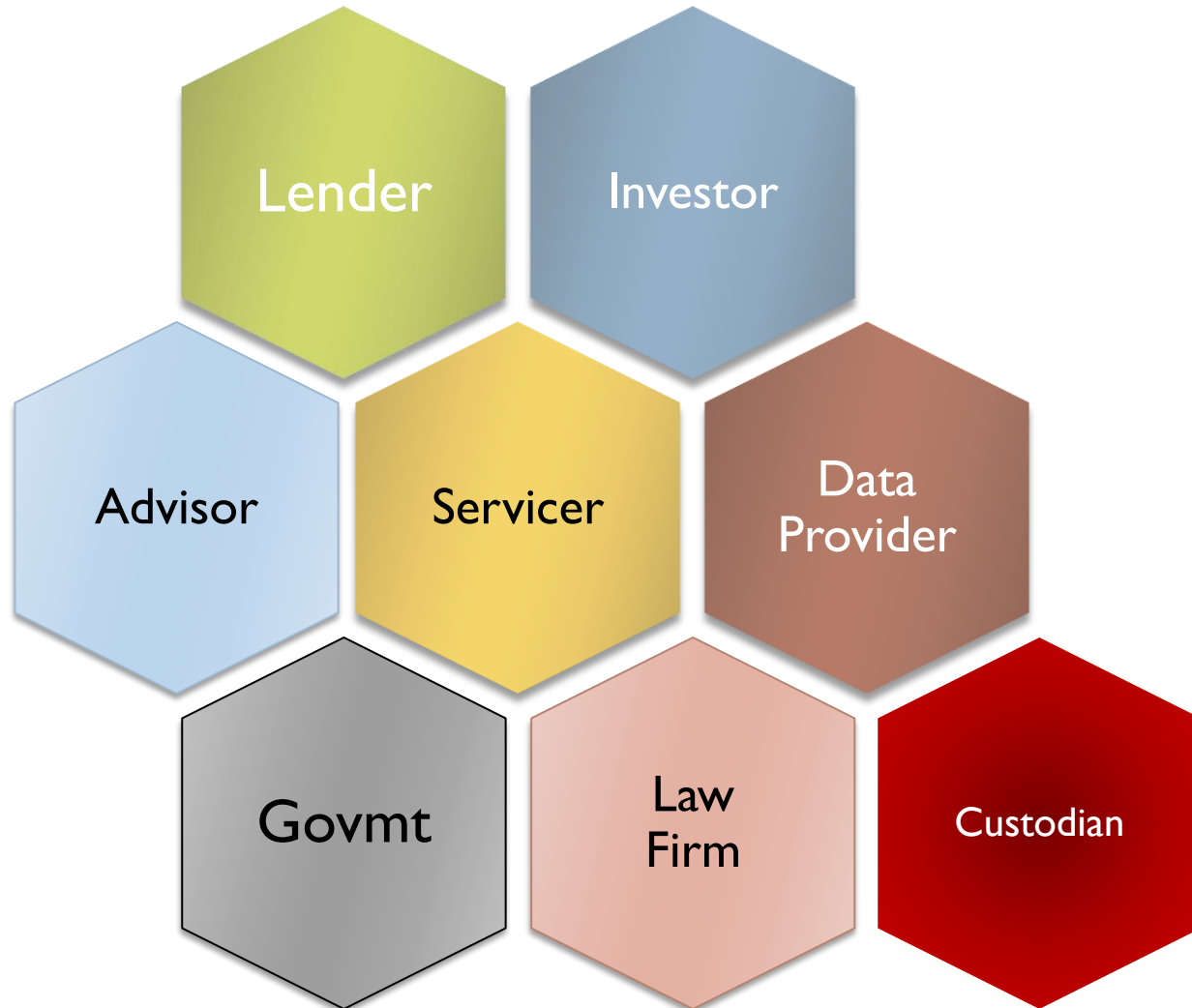
Informed Prospecting

Information Sources

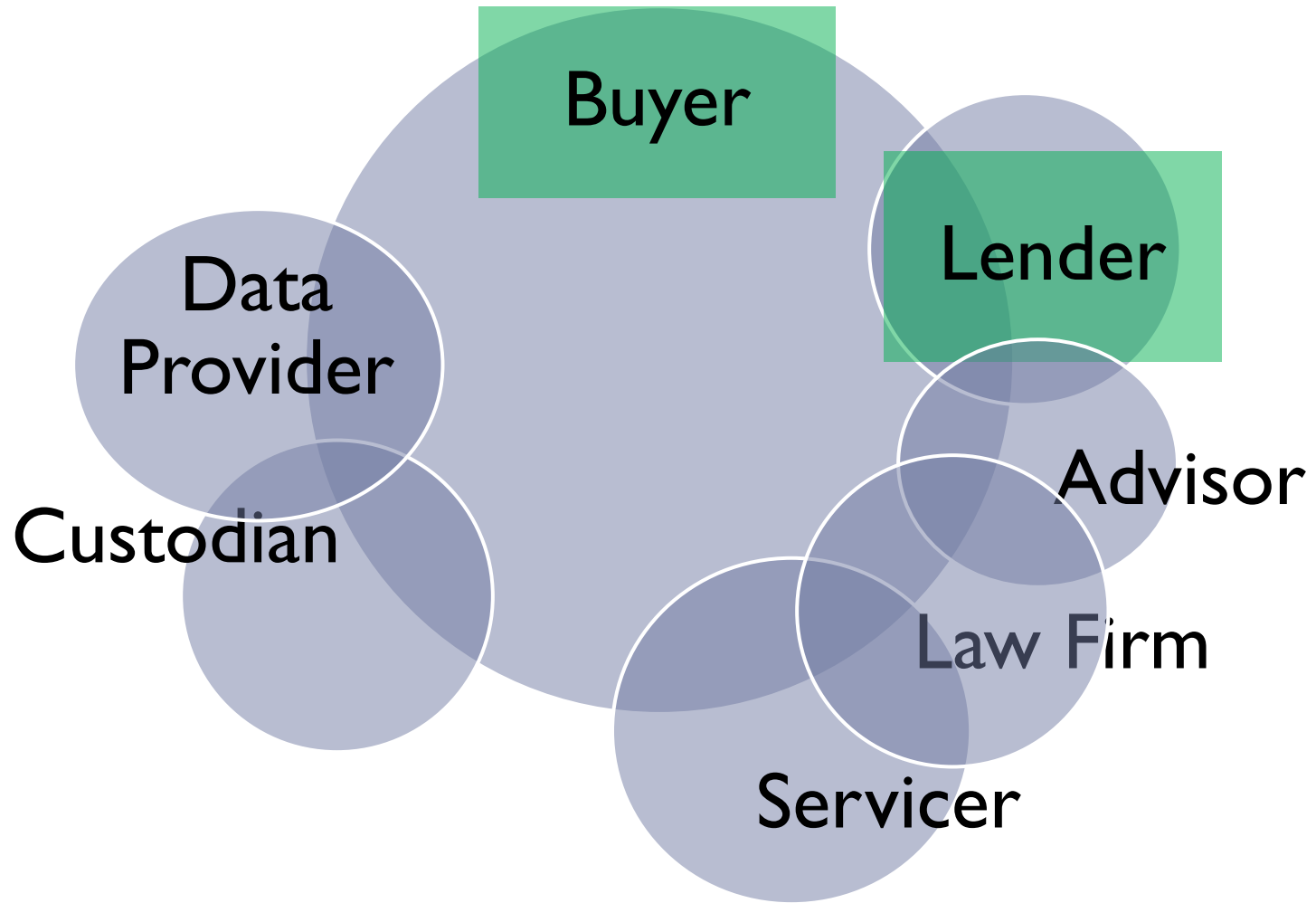
RSS Feeds	Blogs	Info Sites	RE Investors	Data Sources
AZ Tax Liens	Big Rock Invest	Bigger Pockets	AEW	GrantStreet
Bankrate	Boston Investor	Forbes	ARCP	LienSource
RE News for Real	CP Exchange	Fortune	Blackstone	TSR
CREOnline	Green Button	Freedom Mentor	Edward Vocola	
Small Business	RE Investing Blog	Informed Investor	GE Capital	
Tax Lien Consulting	Tax Lien Investing	Investopedia	Goldman Sachs	<u>Paid Sources</u>
Tax Lien Tips	The Llenrock Blog	Opal Education	Hines	Bloomberg
TSR		Save Wealth	Inland RE Group	Hoovers
US Tax Lien Assoc		Tax Lien Lady	Invesco	Kiplinger
		Tax Research	Morgan Stanley	Moody's
		TaxLien.com	RREEF	Morningstar
		TaxLiens.com	Tower	Thomson Reuters



Channels (Market Segments)



Channels



Market Research

- Source information and market influencers
- Target prospects and relationship farming
- Build profiles of targets by needs and pain points
- Build messaging to key drivers in target profiles
- Prioritize target markets and leads
- Competitive analysis and SWOT



Prioritize Channels

Channel	Potential \$	Referral Source	Cost/Risk/Time	Priority
Lender	High	Low	Low	1
Advisor	Med	Med	Low	2
Legal	Low	High	Low	3
Investor	High	Med	Med	4
Data Provider	Med	High	High	5
Custodian	Low	High	Med	6
Servicer	Med	High	High	7
Government	Low	Med	High	8



Competitive Matrix

	Priority to Clients	LienApp	LienLog	LienQuest	DJ Lotus
Brand Image	3				
Expertise	2				
Reputation	2				
Stability	3				
Location	5				
Services	2				
Applications	2				
Sales Method	3				
Financing	4				
Value	1				



Value Proposition

Match Message to Market Need

Needs by Channel

Channel	Needs (Known)	Risks (Unknown)	Value Proposition
Lender	Analysis reports	New markets	
Advisor			
Legal	New market rules Collections, tracking		
Investor			
Data Provider			
Custodian			
Servicer			
Government			



Needs by Stage

Stage	Needs (Known)	Risks (Unknown)	Value Proposition
Unknown	Reputation		
Web Visitor	Value		
Subscriber			
Lead			
Prospect			
Contact			
Potential			
Client			

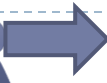


Match Message to Market Need

Market Need	LienApp™
Lower overhead	Streamline
Keep control	System not Servicer
Grow without costing more	Scalability
Reduce regulatory complexity	Built-in state rules
Track notices and reminders	Enforcement's automated workflows
Accurate returns and yields	Multiple valuations for any point in time
Get more time for due diligence	Less time tracking, more time investing
Break down barriers to new markets	Built-in rules for 14+ lien states
Reduce errors	Multiple checkpoints, less redundancies
Slick reports to fund managers	Flexible dashboards and reports



VADAR



- ▶ **Start with the Tool**
 - ▶ *Explain how it works*

OR



- ▶ **Start with the Problem**
 - ▶ *Provide the solution*

Identify Needs

- ▶ Cut Costs Operational
- ▶ Increase Returns Efficiency
- ▶ Grow Lien Portfolio
- ▶ Expand to New Markets
- ▶ Know Precise Cash on Hand
- ▶ Reduce Errors; Improve Reliability
- ▶ Manage Paperwork, Processes, and Tasks
- ▶ Incorporate 1000's of Municipal Business Rules
- ▶ Improved Reporting and Transparency to Investors
- ▶ Stand Head and Shoulders Above Your Investing Competition



Approach

	TRANSACTIONAL	CONSULTATIVE	ENTERPRISE
Software & Service	<ul style="list-style-type: none"> Well Understood Readily substitutable Standard items 	<ul style="list-style-type: none"> Differentiated Customizable Hidden Capabilities 	<ul style="list-style-type: none"> High Strategic and/or cost importance Limited substitutability
Key buyer concerns and decision criteria	<ul style="list-style-type: none"> Price Availability risk Ease of acquisition 	<ul style="list-style-type: none"> Importance of problem Solution fit Price-performance tradeoffs 	<ul style="list-style-type: none"> Platform fit Values fit Sustainability
Time horizon	<ul style="list-style-type: none"> Event 	<ul style="list-style-type: none"> Purchasing stream 	<ul style="list-style-type: none"> Strategic plan
Nature of relationship	<ul style="list-style-type: none"> Cost - based Buyer-seller Confrontational 	<ul style="list-style-type: none"> Benefits - based Client-advisor Cooperative 	<ul style="list-style-type: none"> Trust - based Business equals Insider Both parties change fundamentally
Prerequisites for success	<ul style="list-style-type: none"> Access to decision maker 	<ul style="list-style-type: none"> Access to influencers 	<ul style="list-style-type: none"> Access to strategy
Nature of sale	<ul style="list-style-type: none"> Doing the deal 	<ul style="list-style-type: none"> Problem solving 	<ul style="list-style-type: none"> Agenda setting Boundaries blur-

Educate and Enlighten

- ▶ **Volume Increases Your Costs**
- ▶ **High Barriers to Enter New Markets**
- ▶ **Administration Steals From Due Diligence**
- ▶ **Ops and Tracking Exceed Spreadsheet Capability**



Prospect Profiles

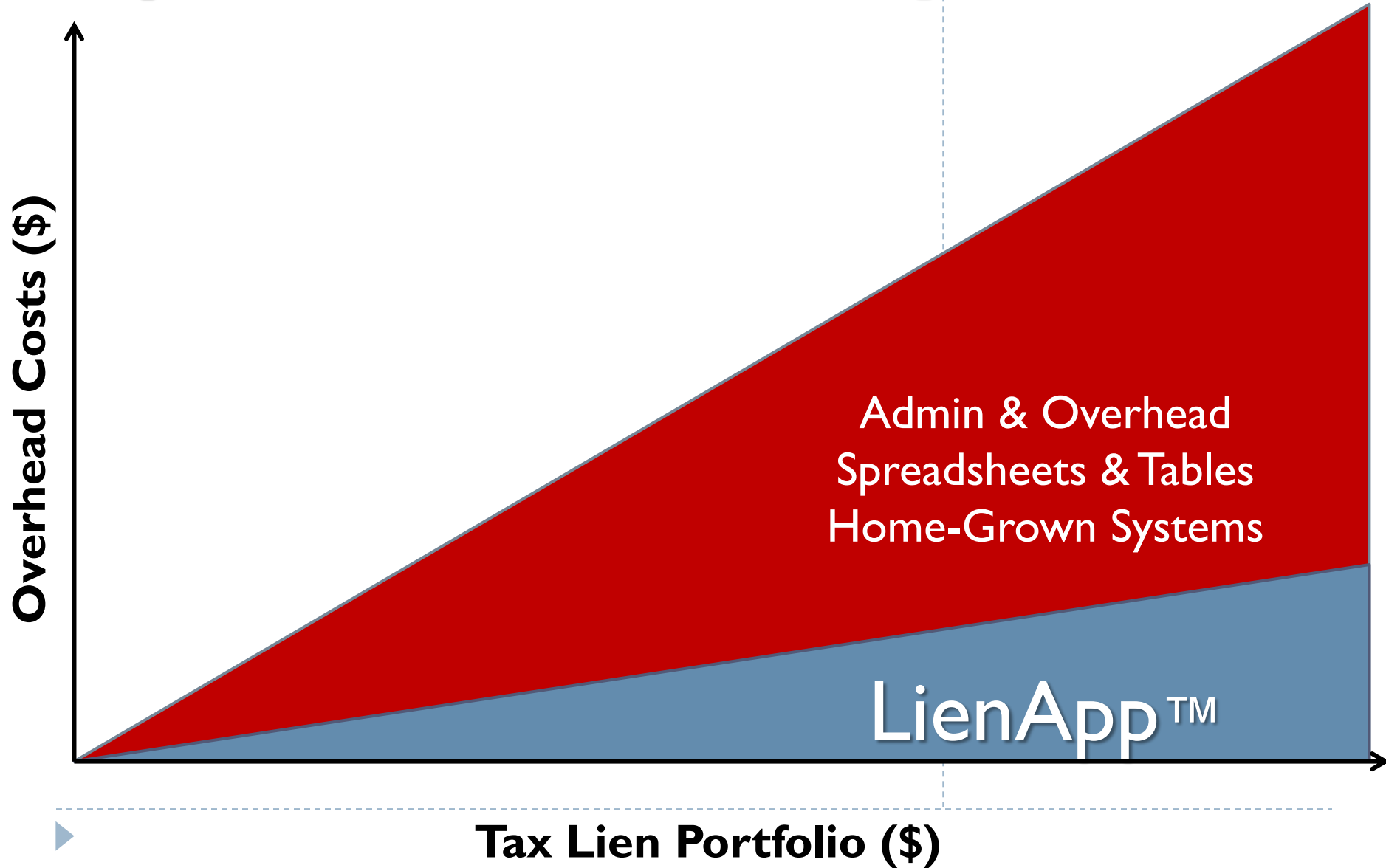
Prospect Traits	Sales Tactic
Wall St Investor	Savvy with investment figures
Confident bordering cocky	Stroke ego, speak with assumption
Unapologetic	Avoid gotchas, illuminate tactfully
Self-Reliant	Value ownership, service



Concepts

Visual Value

Operational Efficiency



Tax Lien Servicing Cliff Hangers

Mailings

Notices

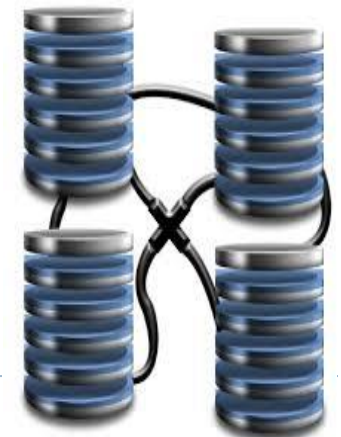
Penalties

Collection

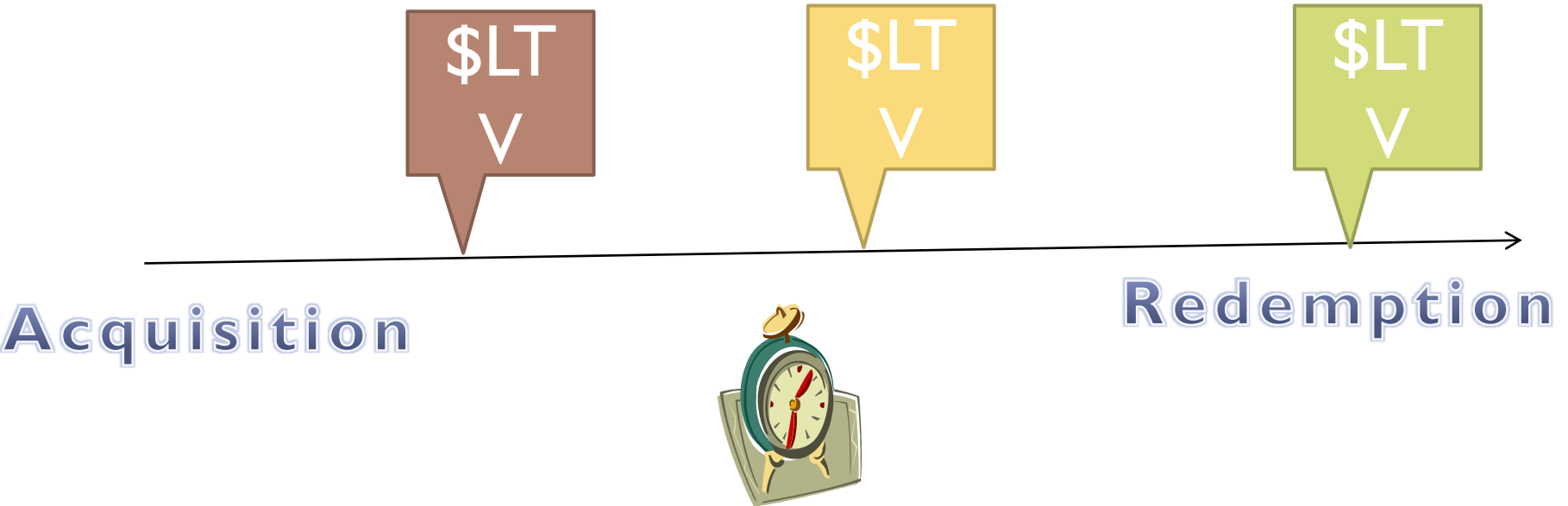


Power Beyond Tables

- ▶ Acquisition -> Redemption
- ▶ Penalty, Premium, Fees
- ▶ Property, Owner, LUC
- ▶ Mailings, Notices, Reminders
- ▶ Assessed Value, Market Value
- ▶ Interest, Return, Yield



LTV Time Machine



Your Lien Tracking Options

Paperwork



Develop



LienApp



NTLA Show

Feb 2015

NTLA Cheat Sheet

- ▶ Workshop Topic Lien ROI
- ▶ Awareness & Education
 - ▶ Valuation complexity
 - ▶ Regulatory hurdles
 - ▶ Administrative challenges
- ▶ Calls to Action
 - ▶ Learn more from VADAR Systems
 - ▶ See how LienApp™ boosts ROI



Tax Lien ROI “Cheat Sheet”

Investing in tax liens is unique largely because complex, diverse regulations apply.

This gives you, the investor, the opportunity to out-smart competitors and stay one step ahead with superior due diligence. On the other hand, your portfolio must take into account the complex regulations and business risks associated with the industry.

State	Interest	Online	Bid Down?	Subsant- interest?	Penalty Amout	Penalty Recover?	Penalty Interest?
AL							
AZ							
CO							
D.C.							
FL		Yes			5%		
IL							
IN							
IA							
KY							
MD							
MI							
MS							
MO							
NE							
NJ							
ND							
OH							
OK							
SC							
VT							
WV							
WY							

Hybrid States CT, DE, GA, HI, LA, MA, PA, RI, TN, TX

Learn how our system with **built-in** performance variables, business rules, and workflows lowers your overhead to increase your returns.

Learn more on
LienROI.com

Call for a free demo
877.823.2700





Landing Page Mock Up



Private Sector

Name

Email

[Send](#)

VS.

First name

Last name

Company

Questions

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Thanks for visiting us at the **NTLA Conference!**

We hope you enjoyed the conference as much as we did, and we look forward to keeping in touch.

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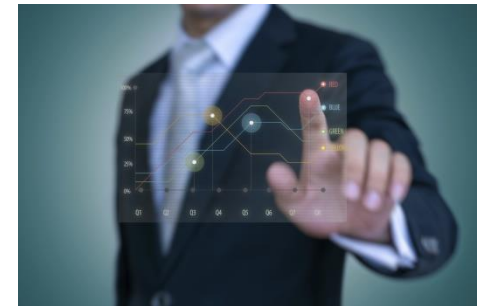
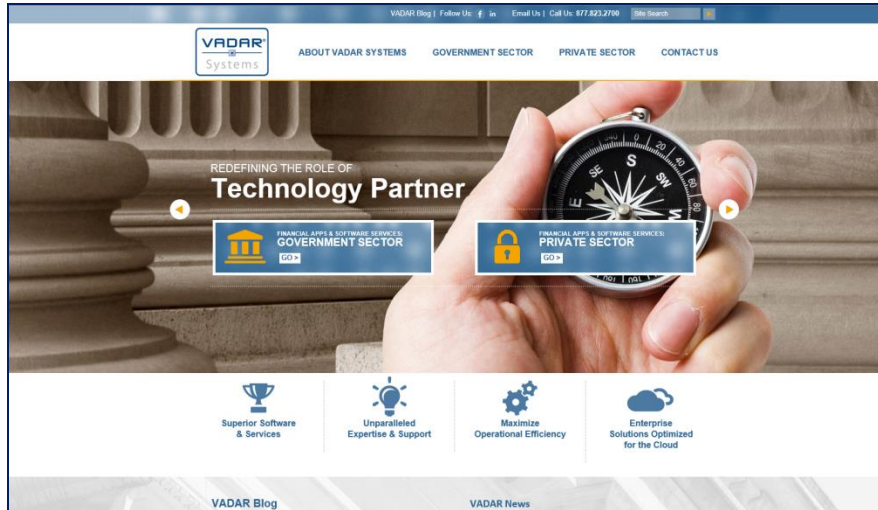


LienApp™ Landing Pages

- ▶ Generate Interest
- ▶ Drive New Leads
- ▶ Qualify Prospects
- ▶ Increase Touch Points
- ▶ Reinforce Brand



Icons and Images



Sample Box

Button

