

S2: E114: Are you missing out on potential clients?

Hey there, I'm Tiffany and you are listening to the Your Legacy Brand Podcast. If you're a high-achieving, mission-driven entrepreneur who wants to elevate your income, impact, and influence, you're in the right place. I left my corporate career as a creative director for Fortune 500 Brands to create a legacy with my life's work and to support entrepreneurs like you to do the same.

You pour your time, energy, and passion into your business. So let's make sure your efforts will create a ripple effect that reaches far into the future. I'm here to provide you tools and ideas to make massive shifts and quantum leaps in your business, transforming you from entrepreneur into legacy brand. Whether your big vision is to be a New York Time bestselling book author, stepping onto the TEDx stage or simply having a sustainable business and income doing the work you love, my goal is to take you to being seen as the go-to expert in your space. So sit back, relax, and let's jump into today's episode. Hello and welcome back. Today I'm thrilled to introduce you to our incredible guest, Rebecca Bertoldi Clayton. Rebecca is a self-proclaimed and she's created countless data-driven strategies for small local businesses to tech startups, all the way to multi eight-figure global businesses. She was part of personal development leader, Mary Morrissey's marketing team, and her unique experiences helped to craft compelling campaigns that connect with her clients' audiences, increasing their brand's outreach and profitability.

Rebecca is passionate about her work and believes all-size businesses deserve great marketing. She has won awards for her work and when she's not creating campaigns, you can find her at home in Connecticut with her husband and fur babies. Welcome, Rebecca, to the show. Thank you so much. I'm glad to be here. Same. So we have so much to talk about today because obviously branding and marketing goes hand in hand, I believe that you can't have great marketing without an amazing brand and vice versa. If you have a great brand, but you don't have great marketing, then it's not going anywhere. So today we're talking specifically about increasing your impact with automation. I wanna talk about our connection through Mary Morrissey a little bit and all sorts of other things. So just to get started, you mentioned, well, you didn't mention it, I mentioned it, in your bio that you just have such an extensive background working with different levels of clients. And I love the fact that you said you deserve that you think all size businesses deserve great marketing campaigns. Um, so as we get going, like, I'd love to hear just a little bit more about that journey and where you're at now and who you're most excited to be serving at the moment.

So I do believe that. I feel like everyone does need to have some great marketing on their side and I also recognize that some people starting out just don't have the resources to hire an agency and things like that. So when they're looking at how they can really grow their business, they're getting overwhelmed right away. So I definitely feel like there are tools out there that they can use. I offer things for startup businesses as well just to have that support but a great campaign can make or break your sales. So it's important to look at your marketing from a different lens. I think people automatically go in and they're like, okay, I have to advertise, but you don't have to advertise. There's a lot of organic things that you can

do. There's things that take more time than money and a lot of business owners starting out are in that spot. For me, I was actually...

I actually started my business because of an injury when I was in my early 20s. And I've been working for myself more. I've worked more for myself than I have for other people. So I have definitely been through many stages of business myself and have worked with, with different types, just going from my local businesses here, and then working for bigger corporations, like with Mary, Mary Morrissey there.

So it's been a wild ride. And even though I started my career in graphic design, I quickly realized that marketing and the psychology that went with it was for me. So I kind of morphed into a marketing designer pretty quickly and then went straight to marketing. Love that. Yeah, and I love that too because some of the same strategies are kind of applicable to different sizes. But then like you said, there's also, there's like tried and true practices that would apply, but then there's also like, obviously an eight figure brand can afford a lot more and different marketing campaigns. Just like when I worked in corporate and I, with huge names, they would spend like millions of dollars on their brand and most people listening to this podcast are like, that is not attainable for me. So super excited to have this discussion today.

So, you know, we are talking about increasing your impact with automation. Can you just talk about that a little bit on a high level for people that might hear the word automation and get a little bit nervous? Maybe they're not techie or just like, Oh, what does that actually mean? Um, because I think even if people do know what it means, they might not have the exact same context that you're speaking about. True automation can scare people because they think automatically robots like the AIs taking over. And while I do feel like there's a good place for AI in our marketing world, I don't feel like it should take over everything. So when I think of automation, I think automatically of creating great experiences for your clients or customers and it's more about how you're going to make them feel. If you remember that saying, like people don't always remember what you said, but they remember how you made them feel. So we have the opportunity to put some automation in place that's going to serve your clients and future clients and help them to get to know who you are, who you are as a brand and who you are as a person, which is usually the same.

And yeah, it really allows us to connect with more people without spending more time, which is a wonderful thing. Absolutely, because we all want more time back. And I love that too, because I always say, a lot of people, I harp on this and I repeat it all the time. A brand isn't just your logos and colors and fonts, it's so much more, and that includes your customer experience. It's not just about attracting new clients, it's about keeping and retaining clients.

And having a good reputation. So I love that. So if we break it down a little bit more, I guess the first step would be like, how do you nurture leads through automation? Like if somebody goes from not knowing you into, so before they become an actual customer, what would be some strategies around that? So first, a really easy one is if somebody, has come and they're joining your email list. And I will always say that you should always keep an email list that's data that you own that can't be taken away from you. Because anytime some, like one of the, like if Facebook makes a change in their ad system or their

algorithm, you could lose everything that you built up. So keep your own list. So a first place to start is giving people a little bit of a warmup email sequence with your... subscription, like once they sign up for your newsletter, then you wanna, this is an opportunity to introduce yourself, say hello, and then you can have a few different emails that go into ways to work with you, how to follow you on the internet, going to all your social media. You don't necessarily wanna put it in one big email because that's a lot of scrolling. We wanna limit the number of scrolls that we have. We're gonna rip it out a little bit. Yeah and you can have it set up automatically to just start to get to know them. You can have engaging questions in there so that they know that you care about them. Another great one is lead magnets. If you're not familiar with lead magnets, these are pieces of content that specifically solve a problem for your future client there. And it's a great way to, this is now where you can show off how you work.

It's not just getting to know you. This is now, okay, you're in my world and I'm gonna show you how to accomplish what you're looking to do. So it allows your future client to get a sense of what it's like to learn from you, what it's like to work with you and show off your skills on how you know what their problems are and you can solve them. Because again, we're always problem solvers in any business. Yep, exactly.

Amazing. So that's a really great, for people that are like, okay, I know I should be doing this, you know, why, you know, and they want to grow, but they're not necessarily doing the correct things to grow, you know, starting with the email list, a lead magnet, what would you say for people are like, okay, like, I get that, you know, they're a little bit further along, they have, you know, an email sequence, they have a lead magnet. in place, is there anything like extra automation tips that you could give someone who's at a little higher level? So one of the things that's super important and this is how we really increase our impact is that you need to have a plan for after that lead magnet. So we don't want to just say okay yep I made a lead magnet I'm gonna put it out there and we'll see what happens. We want to have a very defined path of where they go from that lead magnet to your next level of impact. So if you think of this as like a staircase for each level, you're going to have like your your free lead magnets at the bottom maybe and then the next level is maybe like your tripwire products that are you know they're \$20 or something like that something low cost that will allow people to kind of test drive your services. And then from there we can bring them into something else, but you need to have that path defined ahead of time because your language will reflect that. So in those emails that you were sending out with the lead magnet, yeah, you can send them the lead magnet itself, you can send over some social proof, you can send over another tip that you wanna share with them. Storytelling is great in these emails. So you really want to be able to bring them to that next step, but know what that next step is ahead of time. And the step after that, like we really want to be able to give them the option to work with us and make it easy. Like that's the biggest thing is let's make this easy for people to say yes. Yeah, absolutely. I think that's such a huge thing. I think so many people is like, okay, I have to leave Magnet up. It's good to go. And then they just either... hear crickets after they get the lead magnet, if you're not consistent in your email newsletter, or if you are consistent, then their next email is just a random normal email newsletter. So having those sequences all set up. And it does take a little bit of work. But then once it's done, it's done, which is awesome. So what would you say to somebody who's like, oh, well, especially, we talked about AI, which we don't have to get into a ton. I think we both agree that it's amazing and you don't

want to rely on it. But what if somebody is saying like, well, I really love having a relationship with my clients. And if I do that, I like to reply personally, but if you want to scale, that's just not possible at some point. So how do you make a nurture sequence, whether it's like right at the beginning or just automations in general in your brand, feel more human?

That's a great question and I think a lot of times when we think of automation, we automatically go to email. But the reality is we can incorporate text messages, we can do voicemails, we can do, and if you have an app, you can do push notifications. So one of the things I do, like recently I was working with a client and we were looking at her whole sequence for a course that she was building. And as we're looking in there, there are certain things as they go through the lessons that she could help support them in a different way, even though it's a self-guided course and it's all automated. So we think about adding emotion into your sequences in different ways. So one example, she was going to, in that course, there is a space where they have to, she's a coach. So she was telling people to forgive themselves for any mistakes they've made in the past so that they could move forward but she wanted them to record a video of themselves, like a selfie video, and saying how they're gonna forgive themselves and look themselves in the eye while they're doing it. And that can be really scary for people to say the words out loud. So what we did was we put in a text message around that time when they're gonna be doing that lesson, and the coach recorded a sample of her forgiving herself so that it would make it easier for people to take that action step when she can show anything by example. So the text was like, Hey, I know you just got to this lesson, and it may seem a little challenging, but I recorded this video for you to make it easier. So imagine, you know, you're going through this self guided course, and then that text message comes in, you're like, Okay, she's got my back here. You know, so you want to create that feeling. pop in because I love supporting people in my programs and having that personal touch. So that's so brilliant because I do messages like that sometimes anyways, but it's like me for each person and it takes a lot of time and I enjoy it. But sometimes I'm on vacation or I can't or whatever. So specifically adding those in just is such a good idea. I love that. Yeah.

Okay, so the other thing that I'm curious about is, you know, there's, well, sometimes this might be a little off topic, but sometimes people, like, especially when I'm branding people, I get a lot of people who are like multi-passionate. And so they have kind of different angles that they're coming from, slightly different target markets. And so that's something we could talk about is like, how would you suggest, um, keeping those slightly separate or like if you have multiple programs, but also there's different buyer types, right, that are coming through as leads and then coming in. So I know that's multiple questions. So, but anyways, I think they all fit together in a sense. So how, from your standpoint, from a marketing standpoint, I know from a branding standpoint, what I would suggest.

But marketing-wise, what would you suggest on how to address that? I'll be the first to say that I have things that I own probably 30 different domain names that all point to different things. So they all do have kind of their own style in a sense, but we do want it to still tie back to the brand in some way. Right. So, I mean, you know that, I don't have to tell you that. So. But it's a good thing to remind people of, for sure. It is. It is. I mean, here's what you don't want. You don't want somebody clicking on something. Let's say, let's say you're a coach and they click on a program that's going to help them feel more

confident in themselves. Then they click on that link, they get to a space that is, they're seeing like business coaching kind of things. It's a big disconnect. And so you don't necessarily want to send people to pages that have multiple offerings. This is the wonderful thing about landing pages. Landing pages shouldn't have other navigation. It should only be there to support the one action you want people to take. So whether that's opting in whether that's making a purchase whatever that may be You want them to only see what you want them to see? So that is the one the beauty of these landing pages. Cause I know sometimes people will go to your website and you can kind of break it out in there. But if somebody is specifically clicking on something to become more confident, they want to see how they're going to become more confident when they get to that page. Right. And I have to sort through things or go down a rabbit hole or whatever. Exactly. Don't make people find what you want them to do. We really need to work on making things easy. It shouldn't take many clicks to get to where they want to be especially with everybody's short attention spans these days. Exactly. And then, you know, there's, there are people out there that are, they communicate in different ways. So for me, I'm a very logical person. I have a tech brain. I'm very direct, you know, so for me, it's, I can look at the information and I'm making a quick decision. But there are other types of people that really want to hear the story. They want to hear more about the product in different ways and then they want to consult with people in their life, like there's definitely those types of buyers. So what we want to make sure is, so well, let's start with everyone, every purchase is emotional, whether us logical people want to admit that or not. So pre-purchase is emotional. So because of that, we want the beginnings of our, like our email flow or our messaging to really tap into that.

We're tapping into the emotion that they're going to feel after they've gone through your program or bought your product or whatever the case may be. We want to show them a clear, like this is how you're feeling now and this is how you're going to feel once you're done. This is what you're going to have. This is what you're going to be able to do, like those kinds of things. So we really hit on the emotional parts in the first couple of emails. And then the logic emails come in. And then this is where we're showing, you know

are logic people like me and making it more of like, this is why you need it. And, and making that logic connection, even though they're going to see that and they're going to be like, well, I would love to have that because it's going to make me feel this way. I understand how crazy that sounds that the logic people are like, yeah, I'm logically making this purchase because it's going to make me feel good, but it's one of those pieces that is. Is. necessary to make sure that you're bringing all of those aspects in. Yeah, I love that. And I, you know, in the branding sense, I always say you can't see the label from inside the bottle. Like it's hard to sometimes get a view of like we're so close to our work that it can be hard to articulate or to get that out into the world, which is why, you know, my gift is helping kind of like take what's in people's heads and messaging wise and put it out into the world. And then visually too.

But I could see that being that too, is like we're often so in our heads of like the way that we gather information. I remember one time I had a client, we were working on a website specifically and she was like, well, I don't like those really long sales pages with all the information. Like I just like it to be short and sweet and I make fast decisions. Well, that's great. That's how you do it, but you're gonna miss out on all the other people like you're saying that need the information and want to read them information.

Cause I'm that way too, like I love to just scan headlines and I don't need all of the little details typically. And so in a sense we could be like, oh, I'll just make it short and sweet, but then you miss out or opposite, you like all the details. So you include way too much. I could see it that way too, right? So that's so good. Think having a happy balance there is good. Like you have to also remember that so many people are accessing our pages from their phones. If they need to literally scroll for days to get all the information that can be problematic. However, making all of your copy skimmable, just kind of to your point there where you're just reading those headlines, you can have those headlines, you can have things in bold. It allows people to get through the page and see the things that you want them to see to make that decision. Yeah, so good. Yeah.

So yeah, thank you. I hope this has been helpful for the audience of really thinking through, hmm, like how can I start automating things? How can I add some automations if I'm already doing it? How do you make it feel human? How do you talk to these different buyer types? And before we go in, I have a few more like, you know, practical questions, but I wanted to take just a moment and it was so funny when we met, I was so excited because we both had worked with Mary Morrissey in the past you specifically on our marketing team. I actually did some design for her back in the day. But also we, you know, we knew people on like her, her children and people on her team. And then I also studied like self, she was my entry point, I guess you could say the entry drug into my self-development journey to the point that I actually spoke on her stage about my story. And it was just amazing. So I was like, I just felt like we were kindred spirits at that point of that specific connection.

So I know that my audience, you know, we're all very much into self development as well and some more woo than others and that's fine, some are little woo adjacent, but regardless of all that, I'd love to just take a moment and just hear a little bit of like how that experience was for you and how it shaped, you know, how you approach marketing. I think there's, you know, I talk a lot about of like the era of bro marketing kind of being over and how, you know, we still do need to talk to like people's problems and how we can solve them, obviously, but there's there's certain ways to do that. So I'm just personally curious how that how that significantly impacted your work. So I would like to start by saying that I started my personal development journey with one of Mary's, um, trains coaches, like with Lauren Brolier. And, um, at the time she was, you know, she was one of the, she got certified through Mary's company. And then I started getting her a lot of results and then more coaches came in. We're getting them results. And then I went to work for the brave thinking Institute and it was. Uh, first like Mary is just, you could not find a warmer just more heart centered individual, you know, she's really been practicing this work for a long time and it's like, okay, that's, that's the goal. Like we're going to get to Mary status. Right. And as I was there on the marketing team, what I was able to learn from them is, cause I was getting coaches to like the six figure Mark and then it's like, how do I get them further? Like, you know, what else do we add to these marketing campaigns? And it was really adding that emotion in and they taught me so much about how to really connect with people in a digital way that made it so that they were really feeling it from the coach or whoever were marketing. So I really got to see firsthand how that works. I was working on like 300 piece funnels.

And they were massive. Like it would be like a three month campaign. And we're saying, okay, this is when we're going to text them. This is when we're going to send them a voicemail. This is when they're going to get emails. This is when it's going to show up on their member area, like those kinds of things. And altogether, it comes together to really create a better experience. So it was really about mastering that experience and making people feel amazing as they interacted with the brand. I love that. And it's so. It kind of goes back to what we were talking about at the beginning of like, your brand is so much more than just, you know, the way it looks and your website. And it's, it is so much of that experience from the moment somebody learns about you to becoming a lead, to going through, you know, and it's like, I don't even love personally, like we do build funnels technically, but it's like, that sounds so impersonal. So I love the idea of like, even with those massive campaigns, the intentionality and the heart, when you can have that heartfelt feeling inside of it, it really does change everything. And I think people really feel that. Like I remember, gosh, it was probably almost 20 years ago. I remember sitting on my couch after three surgeries and like that back then it was like CDs, right? Like we didn't even have the stuff now. And Mary just popped up on my screen. So whatever the campaign was back then and you know, I could feel it through the screen of like, wow, this woman is a real deal. And I think that's like, you know, it's important for someone like me to be able to capture that. First of all, you have to capture the essence of the brand and the voice, but then how do you take that and actually put it in to the marketing machine? In that case, it's a marketing machine and still have that connection. Like it's, it's so beautiful.

I mean, like when you think of how like you're picking moments of Mary's talks or asking her to record something new and you really want that moment to connect with the person that you want to bring in to the BT Brave Thinking Institute world. So how do we do that? It's, it's really putting ourselves in that spot of the, the client that you want to attract and thinking about what is it that that you know, this is kind of like you hear this over and over again, but what's keeping them up at night? What is making it so that they can't feel like a success in their life? Um, who are the people that they're really trying to provide for or impact their lives? So it's, it's a lot of times people won't necessarily make the choice for themselves, but they'll make the choice for the people they love.

So that's something to remember. And, you know, going back to your point about how you are your brands, it's not just your website and your colors. Like I, one day I'm going to be able to have my brand on my car and get more exposure that way, but until I stop cutting people off, I'm not going to do that. Like I need to know, you know what I mean? Like that would reflect poorly on my brand. Yeah.

It's like your reputation. It's like, yeah, having on the podcast. I need to make sure that's an alignment who you're having. I know you're going to start a magazine soon, you know, who you have in there, like who we're partnering with, even who our clients are that our reputation is our brand to take it. Keep taking it a step further, you know, I love that you brought that up. So good. Okay, so to kind of start wrapping up here today.

Let's talk a little bit about lead magnets. We mentioned them earlier, but it is so important. And like you said, email list is like gold in our businesses. So if that's something you don't have yet, please, please, please take Rebecca's advice, my advice, start that up. But what are some tips around developing, like

converting lead magnets these days? And it's funny, cause this is something I just talked about to some of my clients, but of course I look at it from a branding perspective. So I'd love to hear your input with your background and everything of like, I think it's my personal look out, look on it is like, there's always tried and true things that work, but then some, some things are shifting to online and like how people are engaging. So. Like, so we do have a lot of technology at our fingertips, but it's important to remember how the brain works a little bit. So if you, I always encourage people to create lead magnets that you feel good about creating. So if you don't like to write, maybe an ebook isn't for you. If you don't like to do videos, figure out if that's just cause you're nervous getting started or you really don't like to do videos, but you can create a variety. You can do quizzes, you can do meditations. Like there's just so many lead magnets you can make. And when you are creating them, regardless of what they are, when you have other components with it that will solidify the information in their minds, it will go a lot further. So for example, either with an ebook or even a couple like a video series or whatever the case may be, you can have a little workbook component to it. So in the ebooks, I usually kind of say, don't make it a true ebook, make it a workbook.

So that they're reading and then they have spaces to write. Because when we write it out, it's getting into our minds in a different way. And then, yeah. And then with, especially in the coaching industry, we know affirmations go a long way. We know gratitude goes a long way. So how can you incorporate those elements? Because it's gonna make them feel different on the inside and they're gonna attribute it to you. So you can make your lead magnets a lot more powerful if you include some of those other exercises that will engage different senses and engage, engage different parts of their brain. I love that. I love that you brought it back to the emotions and how the brain works because I think a lot of times and you know what feels good to you, a lot of times you know you'll see oh that person's doing that, that must be working. You know we often look outward so often and that's not necessarily the best choice. If, if we don't like doing it that way and or if it's not gonna really serve our audience. So it's beautiful. Right. Cool, well speaking of that, you have a gift for everyone today, which is your highest performing lead magnet framework, which sounds super juicy. Do you wanna tell us a little bit about that? Yeah, so this is something that I continue to revise because as you said, things do shift. So different tactics may work better.

Then what we're doing right now it could change in 10 days, you know for all we know but what you will get is what is performing best for me and my clients at that moment. For the lead magnets and it's gonna be it shows you you know the goes through the different types of lead magnets you can create but more importantly goes through okay what is email one do and then it gives you what those emails should be how you should incorporate your business and how you can get them to that next step. Because again, we wanna make sure we have that pathway. So it'll help you to outline and create a great follow-up sequence and get people to get your lead magnet and take action. Beautiful. So valuable. So we'll put that down in the show notes so you can grab that and also a link to Rebecca's website. And then I have one final question which I always ask everybody.

When we do a guest episode, which is, I have to ask about legacy since the whole, my whole brand is about your legacy. Um, what does legacy mean to you and why is it important as a business owner? Me, I

want to be remembered as somebody that really cared about my clients. Um, I want to be remembered as somebody who was, always giving back in the community. Like I love doing my community work. And I want to be remembered for, of course, great marketing, but beyond that, I want to be somebody that lifted up all these other businesses and helped them to achieve their results. I love that. I love, I love this discussion because we have so much crossover and it's all about the ripple effect. Right. That's right. All right. Well, thanks again for being here, Rebecca.

Thank you for having me. I'm so thrilled that I could be here and that we get to share our message with everybody. Amazing. And remember if you're not consciously building a legacy, you're simply building a brand unconsciously. I hope this discussion with Rebecca inspired you to take action, even if it's simply moving the needle 1% in the direction of your business dreams. Because if we all focus on making an impact, the ripple effects we can have together will truly make a difference.

See you next time. Thank you so much for joining me on today's episode of the Your Legacy Brand podcast. I'm so grateful that you took the time to hit play and listen to the show. If you loved this episode, please provide a rating or review and I will be forever grateful. My favorite place to hang out these days is LinkedIn. So hop on over and let's connect. Or if you prefer Instagram, follow me at tivo I'd love to get to know you and hear your feedback on what topics really resonate and what you'd like to hear more of in the future. You can always find links and resources shared on this show and more about how to create your legacy brand by going to [yourlegacybrand.com](http://yourlegacybrand.com). Remember that what you leave behind is not what's engraved into stone monuments, but what is woven into the lives and hearts of others.

What are you doing today to pour into others and to leave your legacy?