



**Step #1** Dress for Success: Give Your Invoice a Marketing Makeover

**Step #2** Cure their *Deal Amnesia*: Invoices should ALWAYS include the Full Price

**Step #3** Value Added Appreciation

## 3 Easy Ways To Transform Your Invoice Into Marketing Magic

When an invoice lands on someone's desk, what does they typically do? Rush to open it? Excitedly yell out to the team, "Look it's an invoice from company ABC!"? Or just sigh and place it on the "to do" pile?

Chances are most people sigh and add it to the "to do" pile. **Your clients are no different when they receive your invoice.** But wouldn't it be great if an invoice could become a marketing tool, something that clients looked forward to opening?

We've created this resource to help you do just that. By following these three steps, you can transform a standard, functional invoice into something that engages your customers and helps create a better relationship with them.

### Business Invoices: An Untapped Marketing Tool

When you market to a business you are still ultimately marketing to a person. It may be the business owner or an executive within the business. The bottom line is that decisions are made by people, and that is where you need to start.

Let's set aside business for a minute and think about personal mail. When you pick up your personal mail, it's second nature to quickly sort everything into four piles:

1. Personal mail  
(Grandma still sends handwritten letters)
2. Bulk mail of interest  
(Magazines, Association Newsletters)
3. Bills
4. Junk mail

Most people read and prioritize their mail in the order listed above. Junk mail goes directly into the garbage, and bills are set aside to be opened later. A letter from Grandma always gets top billing, followed closely by things like personal interest magazines.

Right now your invoices are probably getting the same treatment as the bills people receive in their personal mail, barely a cut above junk mail. Your customers open them as an obligation, a chore they'd rather not do. Is that the emotion you want tied to your company? No? Then it's time to get those invoices doing double duty.

# 3 EASY WAYS TO TRANSFORM YOUR INVOICE INTO MARKETING MAGIC

## Step #1

### Dress for Success: Give Your Invoice a Marketing Makeover

You've heard the saying to dress for the job you want, not the job you have. *Your invoice wants to be marketing material, so why isn't it dressed that way?*

Chances are you send your invoice in plain white envelopes, maybe with your logo printed on it somewhere. Take a fresh look, pretty bland isn't it? Not something to inspire interest, much less excitement.

#### Quick and Easy Tips for an Envelope Marketing Makeover

- *Use customized envelopes that reflect your brand.* In today's world of print on demand there are extremely cost effective solutions to printing custom envelopes. Yes it may add 50 cents or even a dollar to your cost, but how does that compare to the cost of losing a client? Or winning a new one?
- *Add a message on the back flap.* Consider a one sentence tip or trick your clients can use immediately. If that wouldn't work with your customer base use an inspirational quote or humorous insight. Even the message "We appreciate you!" is better than a big blank space.
- *Use a QR code to send a video message.* Wouldn't you love to be able to personally thank each person for their business when you deliver the bill? Now you can! Use a QR code on the envelope to take them to a YouTube video of you doing just that.

These fast and budget-friendly changes to your invoice envelope will get you upgraded from the "ugh bills" category to "interesting bulk mail".

Of course if your customer opens this inviting envelope and is greeted with plain white paper titled *Invoice* you've just wasted all this effort. In some ways it's worse, because their expectations were up.

“...Your invoice wants to be marketing material, so why isn't it dressed that way?...”

As with the envelope, the invoice itself should reflect your company's branding. The good news here is that you can create a branded invoice and print in-house on demand to save money. More on invoice content in points #2 and #3 next page.

Want to add a QR Code to your invoices?  
[Sign up for a free version on pbSmart Codes and get started today.](#)

# 3 EASY WAYS TO TRANSFORM YOUR INVOICE INTO MARKETING MAGIC

## Step #2

### Cure their *Deal Amnesia*: Invoices should ALWAYS include the Full Price

I often hear the complaint from my clients that “Customers just don’t appreciate all I do for them.” My response is “Do you ever remind them?” Silence. Even the crickets won’t speak up.

99% of customers have *Deal Amnesia*. This affliction immediately removes any memory of a sale price, repeat customer discount, or free upgrade that you bestowed upon them. *Deal Amnesia* is annoying, but easily addressed.

**ALWAYS include the full market price for any service, product or upgrade you provided your customer. Then have a separate line for each discount or free offer you have provided. This is not overkill.**

Think about your receipt the last time you were at a sale, or perhaps at a discount store like DSW (Designer Shoes Warehouse). It lists the original price for each item, the discount for each item, each coupon used, and then at the bottom a big note saying “You’ve saved \_\_\_\_\_ today.”

Highlighting your clients’ savings is a powerful message.

## Step #3

### Value Added Appreciation

To ensure you’ve permanently moved this invoice and any future invoices out of the Ugh bill pile you need to deliver something of value. There are many ways to do this, and they don’t need to drain your profit. Here are a few ideas:

- Offer a referral fee for current customers who bring you new business. Be sure to point out how many referrals will get them free services.
- Use *pbSmart™ Codes* to link to a video of a tip or trick that will save them money or bring in more customers. Be sure to update the video on a regular basis. Let your customers know they can only get access through their invoice.
- Offer a sneak peek of new products and services. Who doesn’t like to be in the know about coming attractions? You might even offer a pre-launch price or promo.
- Offer a discount code only available through an invoice. This is a great way to upsell or to win repeat business while creating a sense of appreciation with your clients.

**Final Thoughts:** As a marketer, how often do you know a prospect will open and read something you’ve mailed them? When you send an invoice you know it will be opened and read. Turn your invoices into marketing pieces today, and watch your repeat business, upsells and referral business grow. [Click here](#) to learn more about how you can improve your communications through operational efficiencies.