

The \$10M Blueprint

A Masterclass in Growth



DAVID GILLILAND
ELITE ENTREPRENEURS



JESSIE WARNER
ACHIEVE CMO

THURSDAY, MAY 16, 2024
11:00 AM - 1:00 PM
FREE LUNCH

@ KILN IN LEHI

2701 N Thanksgiving Way #100
Lehi, UT 84043

Today's Agenda

Lunch

11:00 AM – 1:00 PM



Catered by
Café Rio

“The Art of Scaling”

11:00 AM – 12:00 PM



David Gilliland
Co-Owner
Elite Entrepreneurs

“Growth Strategies”

12:00 PM – 1:00 PM



Jessie L. Warner
CEO / Founder
Achieve CMO

Do you want a copy of this slide deck and recording?



The flyer features a dark blue background with a faint blueprint of a building structure. At the top, the title 'The \$10M Blueprint' is written in large white font, with the subtitle 'A Masterclass in Growth' below it. Two circular headshots of men are positioned on the left. To the right, the event details are listed in white text.

The \$10M Blueprint

A Masterclass in Growth

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<https://achievecmo.com/10m-blueprint/>

Sponsored by



Growth demands that we shift gears or run out of steam. For the Million dollar business owner, the stages of growth are predictable and so are the solutions.

Elite can show you how to smoothly shift gears without burning out.

Sponsored by



FRACTIONAL CHIEF MARKETING OFFICERS

Companies need experienced marketing leaders but may not have the budget, resources or need for a full-time CMO.

Hiring a Full-Time CMO is Out of Reach for Many Companies

 salary.com®	\$349,146
 payscale	\$180,208
 COMPARABLY	\$249,290
 indeed	\$138,104
 glassdoor	\$201,529
 ZipRecruiter	\$175,770
 ZIPPIA	\$135,198



Full-Time CMO Salary:
\$204,178 / year

\$17,015 / month
+ benefits
+ bonuses
+ overhead

Hire a fractional Chief Marketing Officer for 20-40 hours per month to help you increase revenue and get work done.

Our Fractional CMOs



- 10+ Years in Marketing-Specific Jobs
- 2+ Years in Executive/Leadership Roles
- Bachelor's Degree or Higher
- Industry-Relevant Skills
- Strong Technology Background
- Capable Project Managers
- Excellent Communicators



ENTREPRENEURS

About David Gilliland



David Gilliland
Co-Owner
Elite Entrepreneurs

- Husband of 1, Father of 11, Lover of Life
- Growth Expert focused on Vision, Leadership and Organization
- Proven Track Record in Scaling 7-Figure Businesses
- Helped Companies in Software, IT, Engineering, Manufacturing, Legal, Marketing, Real Estate, Education, Financial/Accounting Services, and more

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david@growwithelite.com



[linkedin.com/in/dgilliland/](https://www.linkedin.com/in/dgilliland/)

Stages of Small Business Growth

What to do and when to overcome the plateaus of business growth



feeling alone

**waiting for it all to
crumble**

frustrating results

**reactive not
proactive**

control freak

don't have the right team

winging it

**undefined
roles**

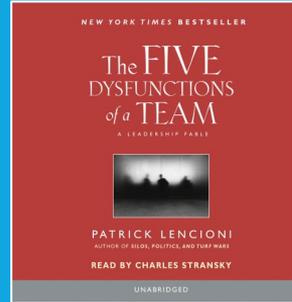
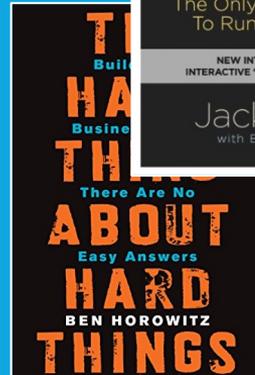
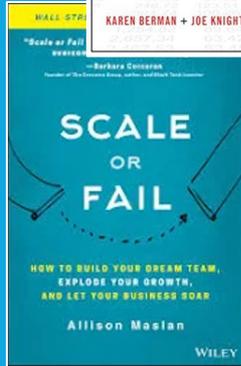
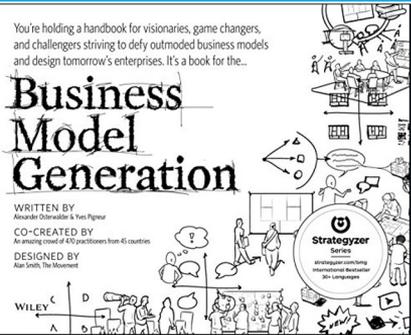
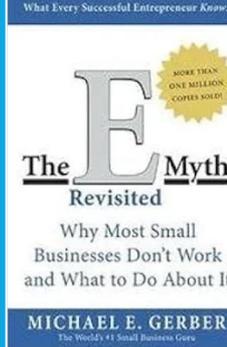
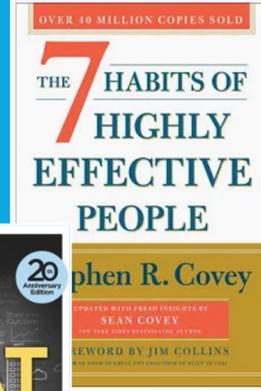
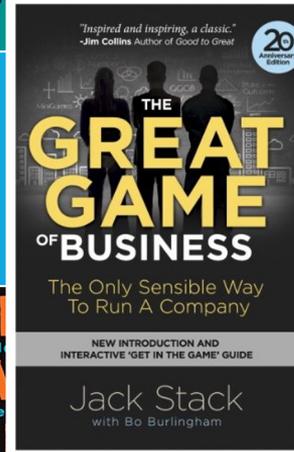
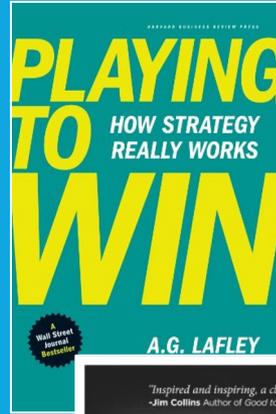
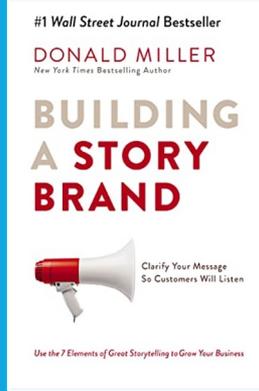
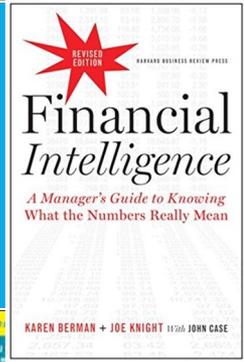
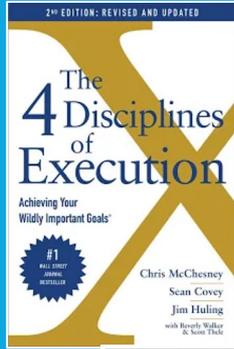
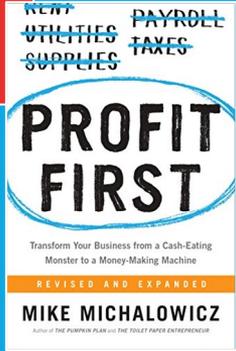
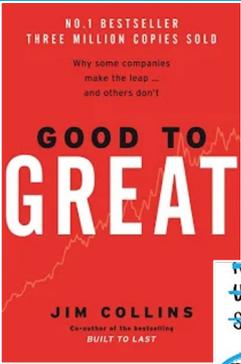
fire fighting

overwhelmed

hit a plateau

**stuck working IN the
business**

employee turnover



**HR
Consultant**

**Fractional
CFO**

The Experts

Accountant

**Marketing
Agency**

Sales Trainer

**Six Sigma
Black Belt**

SEO



**Business
Coach**

**Outsourced
IT**

**Industry
Insider**

**Social Media
Advisor**



Fractional CFO

feeling alone



HR Consultant The Experts

reactive not proactive



waiting for it all to crumble



Accountant

frustrating results



Marketing Agency

Six Sigma

don't have the right team



control freak



SEO

Sales Trainer

winging it

undefined

Business roles

Coach

fire fighting

Industry Insider

overwhelmed

Social Media

Advisor



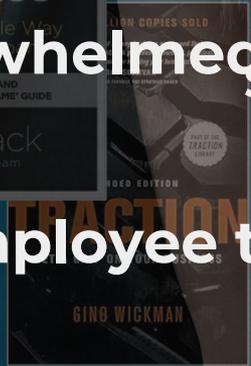
stuck working IN the

outsourced business

IT



employee turnover



Our Agreement

You will be present

I will teach you the keys to growth

You will implement what makes sense for you

I will offer to make it easier and faster for you to implement

You will decide what is best for you to move forward

THE STAGES OF SMALL BUSINESS

What is a small business?

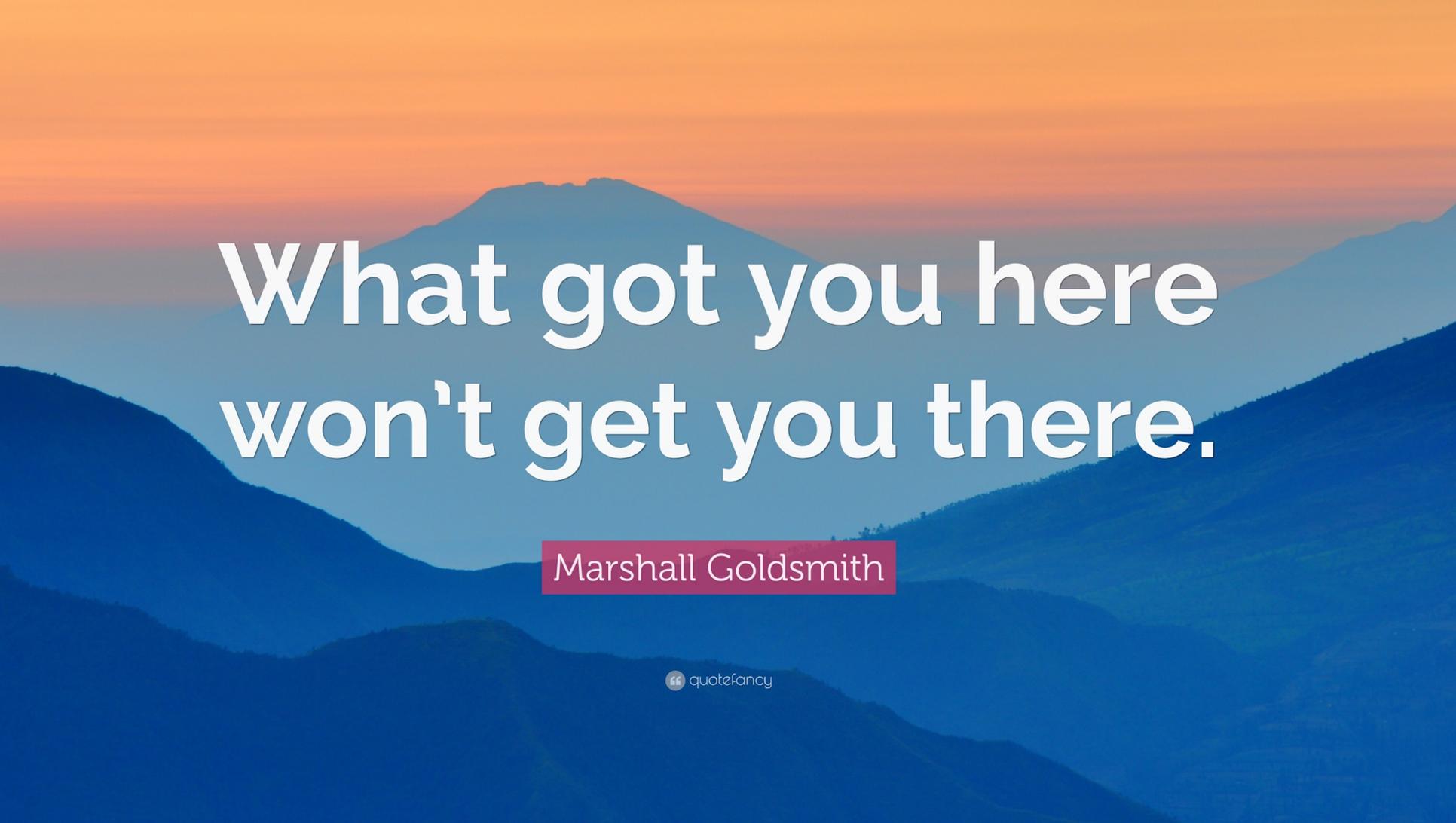
Ask 10 different people and you'll get 10 different answers. Here's our breakdown of the Stages of Small Business and the biggest hurdle in each stage.

STAGE*	1 SOLOPRENEUR		2 NEW EMPLOYER	3 STEADY OPERATION	4 7-FIGURE BUSINESS	5 GROWTH COMPANY
	SIDE JOB	SELF-EMPLOYED				
EMPLOYEES	1	1	2-3	4-10	11-25	26-100
SALES	\$0-4K monthly	\$4-10K monthly	\$100-300K annual	\$300-1M	\$1-3M	\$3-10M
# IN U.S.	16M	6M	1.7M	1.9M	700K	300K
TEAM	OWNER	OWNER + CONTRACTOR(S)	PARTNER OR ASSISTANT	ONE TEAM	MULTIPLE TEAMS & LEADERS	MANAGEMENT TEAM
BIGGEST HURDLE	TIME	LEADS	SALES	MARKETING & SERVICE	PEOPLE & SYSTEMS	LEADERSHIP & CULTURE
	START 1 \$0-100K		RUN 2-10 \$100K-1M	SCALE 11-100 \$1-10M		

* Many business owners choose to settle into a particular stage. These 5 Stages are intended

STAGE*	1	2	3	4	5	
	SOLOPRENEUR SIDE JOB	NEW EMPLOYER	STEADY OPERATION	7-FIGURE BUSINESS	GROWTH COMPANY	
EMPLOYEES	1	1	2-3	4-10	11-25	26-100
SALES	\$0-4K monthly	\$4-10K monthly	\$100-300K annual	\$300-1M	\$1-3M	\$3-10M
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	 START 1 \$0-100K	 RUN 2-10 \$100K-1M	 SCALE 11-100 \$1-10M			

The 1's and 3's of Revenue



What got you here
won't get you there.

Marshall Goldsmith



Stage 1

Solopreneur \$0-100K

STAGE*	SOLOPRENEUR	
	SIDE JOB	SELF-EMPLOYED
 EMPLOYEES	1	1
 SALES	\$0-4K monthly	\$4-10K monthly
 # IN U.S.	16M	6M
 TEAM	OWNER	OWNER + CONTRACTOR(S)
 BIGGEST HURDLE	TIME	LEADS
	 START 1 \$0-100K	

What it looks like in this stage:

- Blood, sweat and tears
- ALL the hats
- Not enough time in the day!
- Dig up leads/sales to survive

Stage 1

Solopreneur \$0-100K

The work to shift gears:

- Grind
- **Learn to discern between activities that will pay off and things that will be a waste of time**
- Grind some more
- Figure out how to get enough customers to survive
- Grind even more
- Grow sales enough to hire someone else (or partner with someone with complementary skills)

Stage 2 New Employer \$100K - \$300K

STAGE*	2 NEW EMPLOYER	3 STEADY OPERATION
 EMPLOYEES	2-3	4-10
 SALES	\$100-300K annual	\$300-1M
 # IN U.S.	1.7M	1.9M
 TEAM	PARTNER OR ASSISTANT	ONE TEAM
 BIGGEST HURDLE	SALES	MARKETING & SERVICE
	 RUN 2-10 \$100K-1M	

What it looks like in this stage:

- Division of labor begins
- Learning to work with others
- Sell, fulfill, sell, fulfill
- Refining product or service to better match customer needs

Stage 2 New Employer \$100K - \$300K

The work to shift gears:

- **Sales skills a MUST**
- Learn to establish clear roles and responsibilities
- Profits reinvested to take hats from the owner

Stage 3 Steady Operation \$300K - \$1M

STAGE*	2 NEW EMPLOYER	3 STEADY OPERATION
 EMPLOYEES	2-3	4-10
 SALES	\$100-300K annual	\$300-1M
 # IN U.S.	1.7M	1.9M
 TEAM	PARTNER OR ASSISTANT	ONE TEAM
 BIGGEST HURDLE	SALES	MARKETING & SERVICE
	 RUN 2-10 \$100K-1M	

What it looks like in this stage:

- Growth feels exciting AND chaotic
- One maybe two really good lead sources
- Owner still VERY heavily involved in making things happen
- Nimble, flexible team but still quite reactive at this stage.

Stage 3 Steady Operation \$300 - 1M

The work to shift gears:

- **Figure out predictable lead generation**
- **Document processes to ensure consistent, quality fulfillment**

93 %

of businesses are
< \$1M in revenue



Failure to shift gears



Stage 4

7-Figure Business \$1M-3M

STAGE*	4 7-FIGURE BUSINESS	5 GROWTH COMPANY
 EMPLOYEES	11-25	26-100
 SALES	\$1-3M	\$3-10M
 # IN U.S.	700K	300K
 TEAM	MULTIPLE TEAMS & LEADERS	MANAGEMENT TEAM
 BIGGEST HURDLE	PEOPLE & SYSTEMS	LEADERSHIP & CULTURE
 SCALE 11-100 \$1-10M		

What it looks like in this stage:

- Owner often the bottleneck
- More headaches/complexity
- Tendency to work IN the business and not ON it
- Functional teams take shape

Stage 4

7-Figure Business \$1M-3M

The work to shift gears:

- **Set the Vision & Enroll the team**
 - Purpose, Values, Mission
 - Mission Goals
 - Mission Strategies
- Organization Design and Big 3
- **Hire, lead and fire to the Vision**
 - Hiring for Values/Culture Fit
 - Onboarding
- **Planning and Execution Meeting Rhythm**

**“You have to become
the leader of your
business, not just the
person who expertly
runs it.”**



Fractional CFO

feeling alone



HR Consultant

The Experts

reactive not proactive



waiting for it all to crumble



Accountant

frustrating results



Marketing Agency

Six Sigma

don't have the right team



control freak



SEO

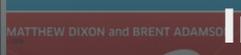
Black Belt



Sales Trainer

winging it

undefined



Industry Insider



overwhelmed

Social Media Advisor

Business changes roles and design tomorrow's enterprises. It's a book for the Coach

Coach

fire fighting

Insider

stuck working IN the

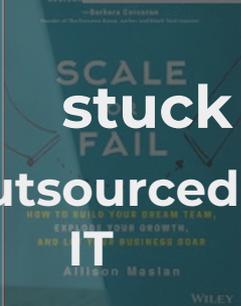
employee turnover

hit a plateau

Outsourced

business

IT



Stage 5

Growth Company \$3-10M

STAGE*	4 7-FIGURE BUSINESS	5 GROWTH COMPANY
 EMPLOYEES	11-25	26-100
 SALES	\$1-3M	\$3-10M
 # IN U.S.	700K	300K
 TEAM	MULTIPLE TEAMS & LEADERS	MANAGEMENT TEAM
 BIGGEST HURDLE	PEOPLE & SYSTEMS	LEADERSHIP & CULTURE
 SCALE 11-100 \$1-10M		

What it looks like in this stage:

- Fully formed functional teams
- Beyond hiring friends & family
- Outgrowing your space
- Cash flow pressures increasing
- Original systems no longer meeting needs of growing customers and growing team (team collaboration tool/platform, financial reporting, CRM, marketing automation, etc.)

Stage 5 Growth Company \$3-10M

The work to shift gears:

- **Build out your leadership team**
- **Develop next-level leaders**
- Upgrade systems (CRM, Financial reporting)
- Secure additional fuel for growth (LOC, loan, investors?)
- Beef up your strategic muscles
- Level up your Marketing and Sales

ELITE LEADERSHIP MODEL



SET THE VISION

- Articulate a Vision with your team
- Create a clear plan for execution
- Champion the Vision until completion



DELIVER RESULTS

- Identify, measure, and report on KPIs
- Create a culture of performance
- Establish a meeting rhythm



CARE



BUILD THE TEAM

- Organize the work
- Hire, lead, and fire to the Vision
- Develop people



Pro Tips and Hacks for \$1M-\$10M

- Transparency/Enrolling team is the best way to go
- Strong culture and stable team make scaling much, much easier
- Resist temptation to hire 'big company' talent
 - Ideally, hire someone who has lead from your current stage to 1-2 stages ahead of you
- Fractional CxO Help
- Develop leaders as fast as you can... leadership will become the gating factor to your future growth

Everything is easy until it isn't





BEST FAILS 2020

pb рпцвнц



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Elite Entrepreneurs

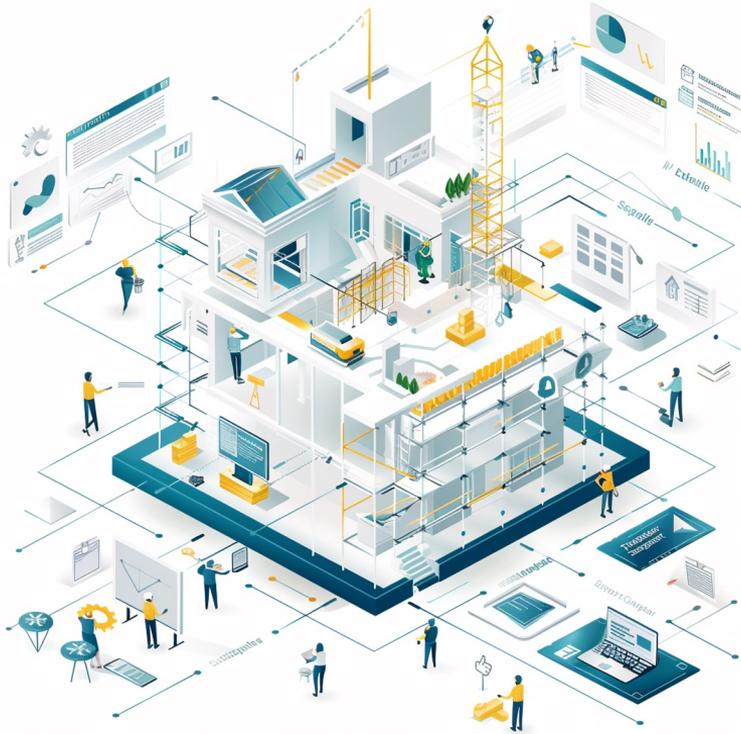
Growth Readiness Assessment



The best leaders build the
best businesses, and the
best businesses win.

The Marketing Blueprint for High- Growth Companies

by Jessie Warner



About Jessie Warner



Jessie L. Warner

CEO / Founder
Achieve CMO



[linkedin.com/in/jessiewarner/](https://www.linkedin.com/in/jessiewarner/)

- 5+ years as a Fractional Chief Marketing Officer
- Previously a Marketing Executive at 5 different companies
- 17+ years of marketing experience
- Master of Business Administration; Bachelor of Science in Marketing
- Worked with 50+ companies to improve their marketing strategies
- Demand generation expert, including SEO, email marketing (Hubspot/Marketo/Pardot), SEM/PPC (Google AdWords Certified), social media marketing, affiliate and partner marketing, call center management, and web analytics
- 10+ years sales operations experience (Salesforce, Zoho One, Hubspot)
- Experience in designing and implementing complex marketing & sales campaigns
- Excellent analytical and presentation skills
- Proficient front-end website developer (15+ websites)
- Skilled project manager (on time and under budget)

18+ Years of Marketing Experience

Corporate Leadership Experience



Marketing Director



Team Lead, Demand Gen



VP of Customer Acquisition



Sr. Marketing Director



General Manager



President

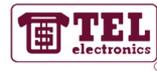


CEO/Founder

Fractional CMO Work



client**success**



APPLAUSE^o



weave



The Marketing Blueprint for High-Growth Companies



1. Clear Company Vision
2. Brand Identity
3. A Story that Resonates
4. Website with Clear Messaging
5. Product-Market Fit
6. Customer Journey Map
7. Marketing Technology
8. Marketing Success Metrics
9. Campaign Tracking & Reporting
10. Diversified Lead Channels
11. Optimize the Funnel
12. Empower Your Sales Team
13. Marketing Sprint Framework
14. Strong Marketing Leadership

Build a Strong Marketing Foundation

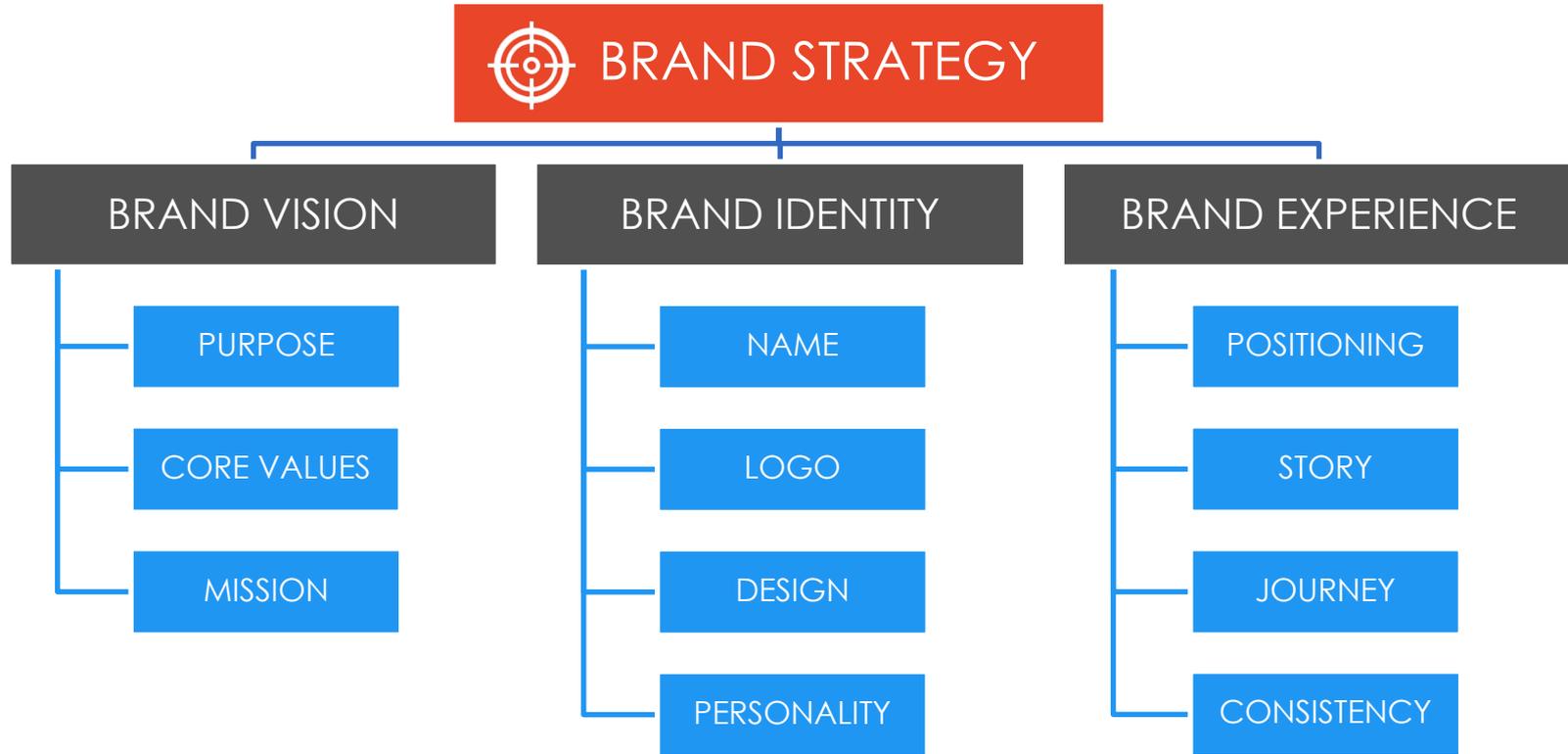
Make Sure You're Ready for Growth

STAGE*	1		2	3
	SOLOPRENEUR SIDE JOB	SELF-EMPLOYED	NEW EMPLOYER	STEADY OPERATION
EMPLOYEES	1	1	2-3	4-10
SALES	\$0-4K monthly	\$4-10K monthly	\$100-300K annual	\$300-1M
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BIGGEST HURDLE	TIME	LEADS	SALES	MARKETING & SERVICE
	START 1 \$0-100K		RUN 2-10 \$100K-1M	

Did you create a foundation for growth?

- Clear Company Vision
- Brand Identity
- A Story that Resonates
- Website with Clear Messaging
- Product-Market Fit

Do You Have a Brand Strategy?



Brand Style Guide and Product Design

Royal Mail Logo Overview

Icon Magazine Rethink

Logotype



Royal Mail. Royal Mail. Royal Mail.

Colour



Typography

RM Regular

abcdefghijklmnopqrstuvwxyz
 ABCDEFGHIJKLMNOPQRSTUVWXYZ
 0123456789@£\$%!?.,:;()'

Transportation



Royal Mail Type Overview

Icon Magazine Rethink

About

RM Regular

Royal Mail. Royal Mail.

RM Regular is a simple sans serif font designed for the Royal Mail. It is to be used in all instances where typography is required.

This is RM Regular

abcdefghijklmnopqrstuvwxyz
 ABCDEFGHIJKLMNOPQRSTUVWXYZ
 0123456789@£\$%!?.,:;()'

AaBbCc1234

Upper & Lowercase

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu Vv Ww Xx Yy Zz

ABCDEF GHIJKL MNOPQRSTU VWXYZ



Is Your Story Clear?



#1 Wall Street Journal Bestseller

DONALD MILLER
New York Times Bestselling Author

BUILDING A STORY BRAND



Clarify Your Message
So Customers Will Listen

Use the 7 Elements of Great Storytelling to Grow Your Business

The Story Brand Framework Broken Down



A Character

Potential Customer



Meets a Guide

Your Brand



With a Problem

Pain or Opportunity



Who Gives Them a Plan

Your Product / Solution

Character = Your Buyer Personas

spinGO®



Event Calendars



I am a volunteer

VOLUNTEER VICKI

Publicity Chairman, Baton Rouge Gem and Mineral Society



I work for a non-profit organization

NON-PROFIT NANCY

Community Partnerships Associate, Ronald McDonald House



I work for a promotion group that owns two venues.

VENUE VINCE

Marketing and Admin Manager, The Depot



I work for a company specializing in events

PROFESSIONAL PAUL

Director of Development and Communications, Beacon Group



I work for a company and events is part of my job

CORPORATE CHRISTY

Event Marketing Specialist, Ebay



I work for an agency

AGENCY ANDY

Account Manager, Thomas Arts

Your Ideal Client Profile

spingo EVENT MAKER PERSONA



PROFESSIONAL PAUL
Director of Development and Communications, Beacon Group



NON-PROFIT
VOLUNTEER
CORPORATE
PROFESSIONAL
AGENCY

I work for a company specializing in events

"I got my hand in a lot of cookie jars. I would love to know of one place where I can hit my target demographic. I feel like I'm spread thin going to lots different places."

SALES

Overview

Event Passion
Doesn't care much Cares greatly

Estimated Event Budget
\$25 \$25,000

Event Promotion Timeline
180 days 90 days 30 days 2 weeks 1 week Event date

Behaviors
An expert in event management
"It worked before it will work again"
Organizes multiple events each year
Works long days and weekends
Very versed in online marketing
Works with large sponsors
Thinks he knows his target audience
Juggles events at the same time

How to Sell
We are an expert in event promotion
Let's do a test. Start small, go big.
Become a partner, let's do this together
We can save time and relieve stress
Guaranteed clicks (match CPC's)
We can target multiple states
Validate his expertise, offer targeting
Focus on the event, we'll handle promotion.

Buying Roles

Submitter Title: Event and Program Specialist, PR Specialist, Social Media Coordinator, Marketing Specialist. Duties: Plans large scale events, works with many vendors to execute.	Decision Maker Title: Director of Development, VP of Communications, Marketing Director, Owner. Duties: Oversees the production of the event, manages budget, and approves strategy.
--	---

MARKETING

Demographics

Age:
25-50 years old

Personality:
Confident, enthusiastic, involved, candid, and witty.

Industries:
Convention and tradeshows, event planning services, promoters of arts, entertainment, sports and media.

Event Types:
Large nationwide events, concerts, expos, mainstream sports, races, fun runs, arts, entertainment, festivals, rodeos, public sports events, fairs, cultural events, conferences, and tradeshows.

Web Behavior
Uses all social media
Reddit
Pollstar
Buzzfeed
Bloggers

Common Searches
Event venues
Community calendars
Online marketing
Promote my event online
Event planning tools
Conferences for meeting planners

Things They Care About
Increasing audience with fan base
What's hot / hip / cool
Ticketing solutions
Latest social media trends
Building brand integrity
Likes infographics

PRODUCT

Overview

Reporting Expertise
Doesn't care much Tracking

Technical Knowledge
Very basic solutions Complex marketing

Number of Events per Year

20+	5-19	4 or less
Level 1	Level 2	Level 3

User Environment
Employed full-time
Works in a medium-sized office
Member of a team, 1-10 members
Tools Used: Email, Microsoft Office, Google Docs, Google Analytics, Project Management tools, Email Service Providers, and Point of Sale systems.

User Behavior
Ticketing solutions
Tracking
Attribution surveyed online during ticket process
Appreciates good design
Likes checklists
Plans multiple events
Measures campaign success with attendance
Researches venues (e.g. parks exposition centers, areas, etc.)
Finding sponsors
Hard time keeping employees (w/specialized skills)

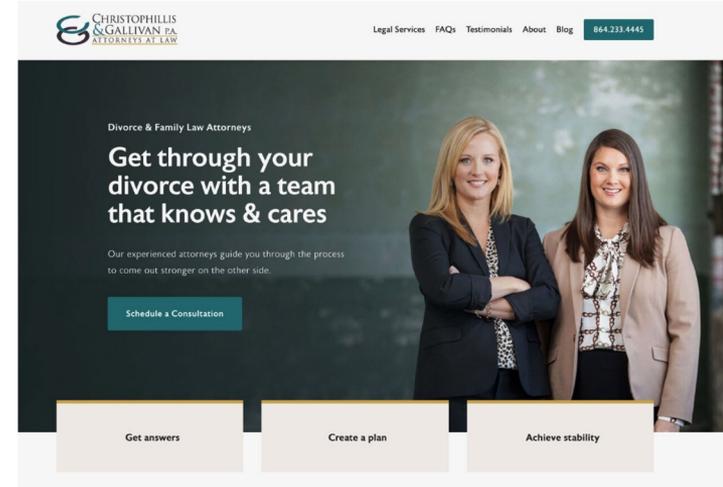
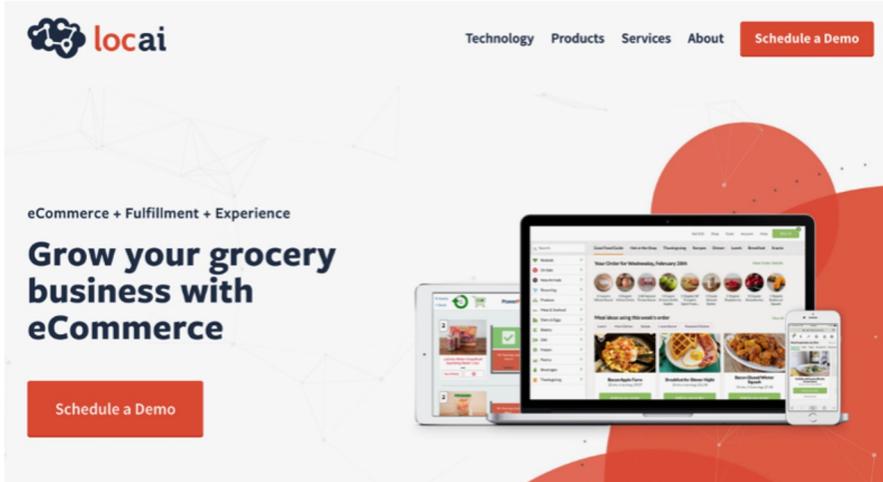
Ideal Client Profile (ICP)

- Large nationwide events, concerts, expos, sporting events, races, festivals, rodeos, fairs, conferences
- Owner, Director of Development, VP of Communication, Marketing Director

A Problem = Pain or Opportunity

Marketing Problem	Cause	Clever Name for Cause	Detail Around Cause
Poor Alignment & Visibility	Change is Constant	Change Happens	<ul style="list-style-type: none"> •Change causes frustration and digression •Differing occurrences in markets, economics, competitive landscapes, leadership, products, processes cause change
	Course Corrections	Turning a Battleship	<ul style="list-style-type: none"> •Difficult to make course corrections consistent across organization •Alignment and execution of corrections is arduous
	Lack Visibility	What's Going On?	<ul style="list-style-type: none"> •No central source of work (everyone uses different tools) •Status reports take time to gather, compile, and report •Status reports are periodic/historical
	Strategic Disconnect	Broken Bridge	<ul style="list-style-type: none"> •Complexity of organizational communication methods makes it difficult to ensure everyone is on the same page •No way to easily connect strategic objectives to work
Poor Collaboration	Ineffective Work	Driving with the Parking Brake On	<ul style="list-style-type: none"> •A lot of extra effort is required to continually align and execute marketing work using traditional methods (meetings, spreadsheets, emails, status updates)
	Too Many Emails	Email "Limbo"	<ul style="list-style-type: none"> •Communication overload through varying formats (emails, tools, groups) causing a "Ignore all" mentality
	Limited Cross-Team Insight	Horse Blinders	<ul style="list-style-type: none"> •No insight into what is going on with teams and work •All work impacts others and me
	Poor Teamwork	Anti-Social	<ul style="list-style-type: none"> •Too busy for social alignment •Information overload without context and meaning

Your Website Lays Out the Plan



Achieve success by following our plan. Call to action. Visual of success.

Grow your grocery business with our eCommerce solution. Schedule a Demo. Product Screenshot.

Get through your divorce with a team that knows and cares. Schedule a Consultation. Happy women.

You Have a Product or Service that Resonates

- You created something that is the perfect solution to a specific problem.
- People want to buy your product because they recognize its value immediately. They won't need to be cajoled or coerced.
- Your offering establishes a real and direct connection to whatever your market values the most.
- When people hear about your product or service, they immediately understand its value to them, even if they have never heard of your company before.



🍏 iPod



🍏 iPhone



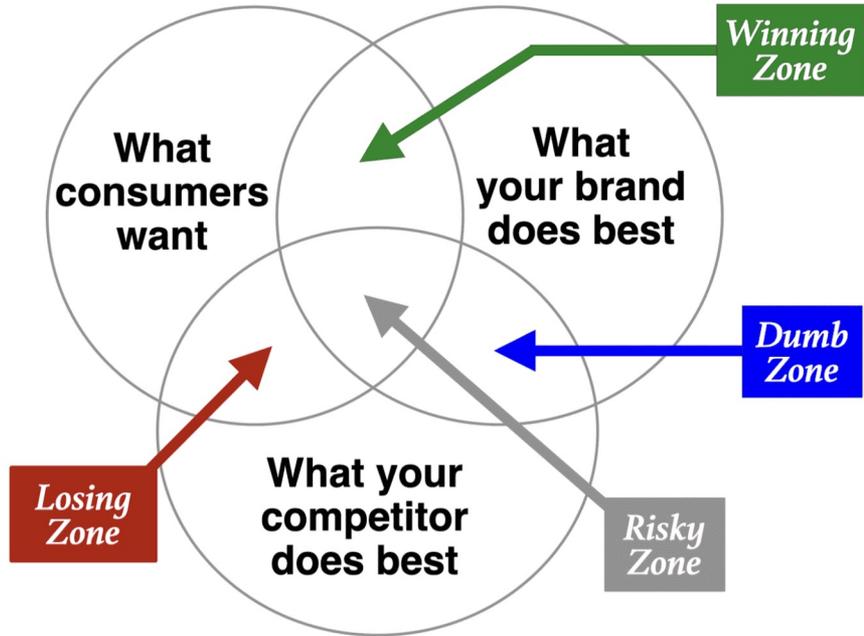
fitbit



TESLA



Brand and Product Positioning



The Winning Zone is where you deliver on a product or service that consumers want that your competitors don't have

Make Sure You're Ready for Growth

STAGE*	1		2	3
	SOLOPRENEUR SIDE JOB	SELF-EMPLOYED	NEW EMPLOYER	STEADY OPERATION
EMPLOYEES	1	1	2-3	4-10
SALES	\$0-4K monthly	\$4-10K monthly	\$100-300K annual	\$300-1M
# IN U.S.	16M	6M	1.7M	1.9M
TEAM	OWNER	OWNER + CONTRACTOR(S)	PARTNER OR ASSISTANT	ONE TEAM
BIGGEST HURDLE	TIME	LEADS	SALES	MARKETING & SERVICE
	START 1 \$0-100K		RUN 2-10 \$100K-1M	

Did you create a foundation for growth?

- Clear Company Vision
- Brand Identity
- A Story that Resonates
- Website with Clear Messaging
- Product-Market Fit

Now Let's Grow!

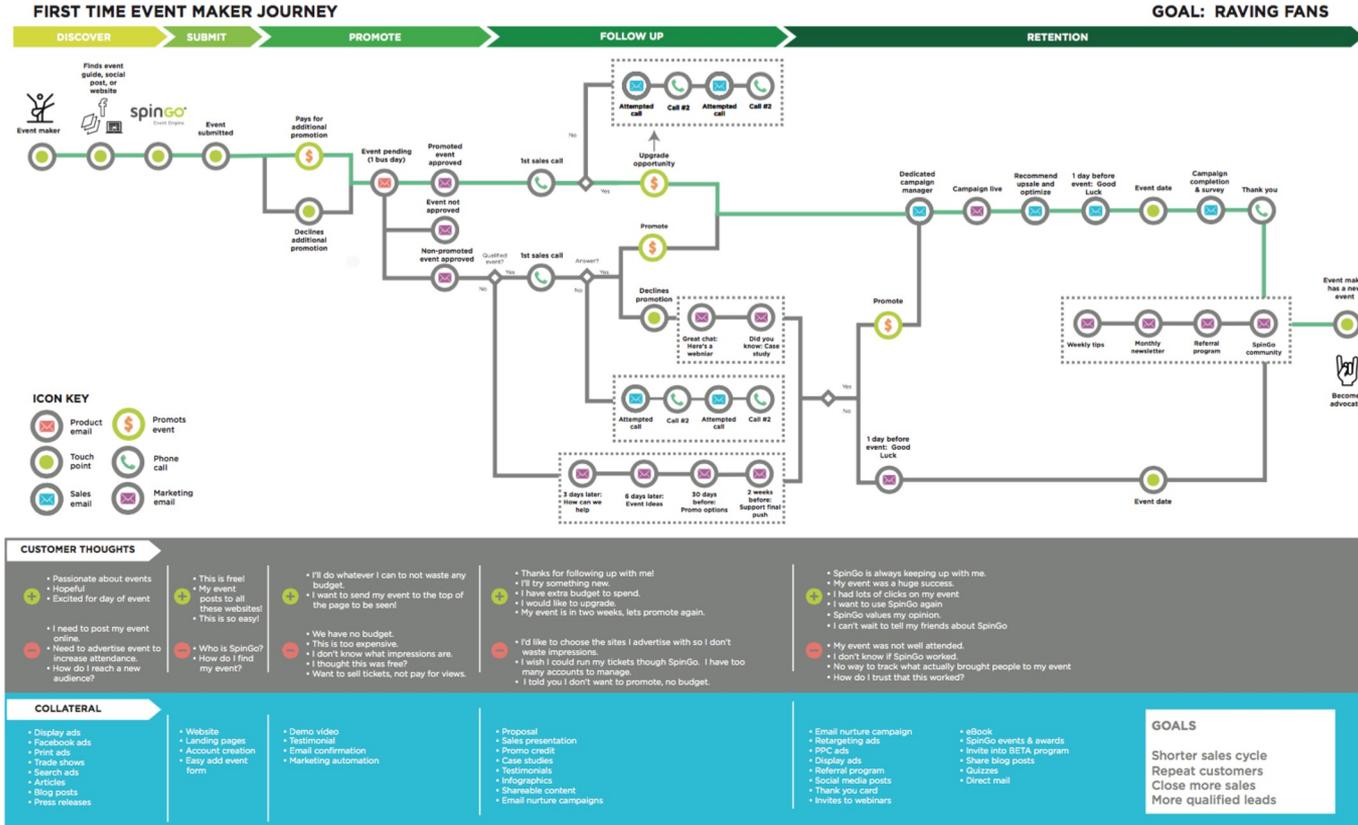
STAGE*	4 7-FIGURE BUSINESS	5 GROWTH COMPANY
 EMPLOYEES	11-25	26-100
 SALES	\$1-3M	\$3-10M
 # IN U.S.	700K	300K
 TEAM	MULTIPLE TEAMS & LEADERS	MANAGEMENT TEAM
 BIGGEST HURDLE	PEOPLE & SYSTEMS	LEADERSHIP & CULTURE
	 SCALE 11-100 \$1-10M	

Marketing & Sales Growth Strategies

- Customer Journey Map
- Marketing Technology
- Marketing Success Metrics
- Campaign Tracking & Reporting
- Diversified Lead Channels
- Optimize the Funnel
- Empower Your Sales Team
- Marketing Sprint Framework
- Strong Marketing Leadership

Build a Strong Technology Stack

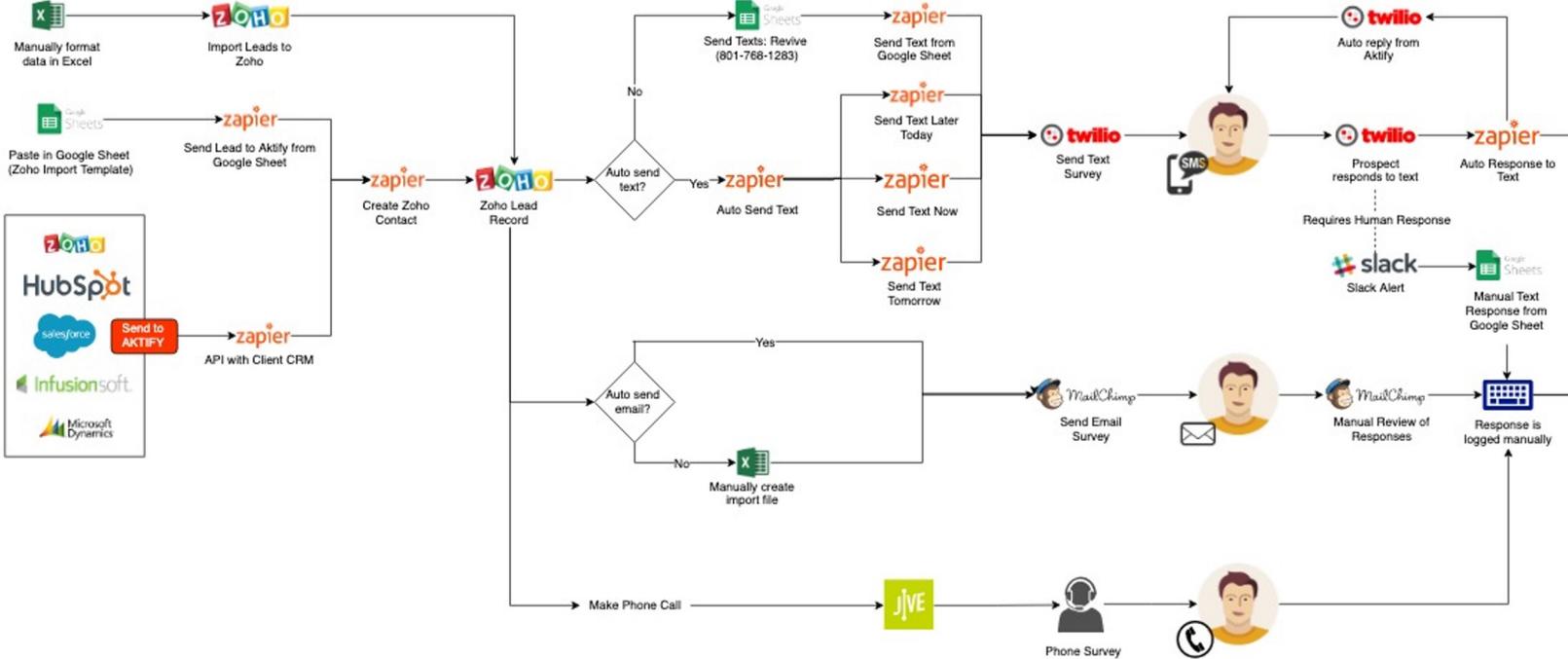
Map the Journey



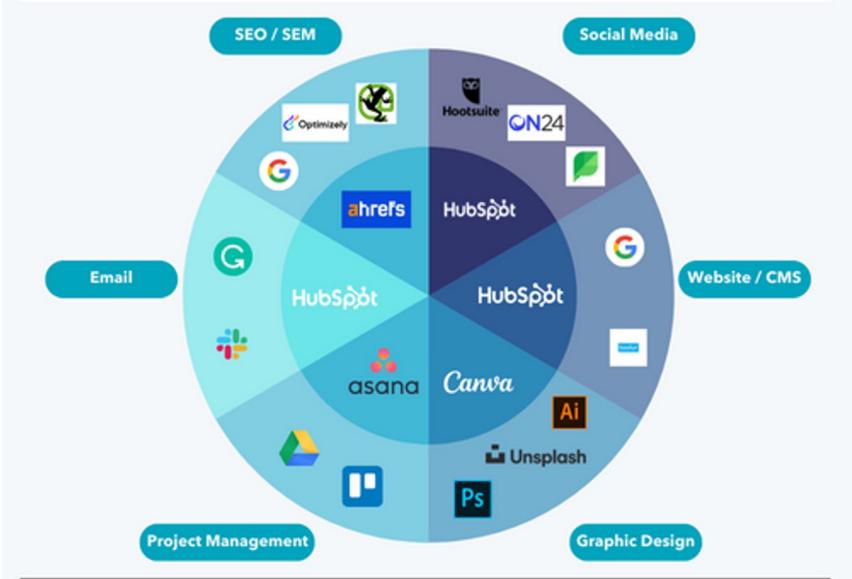
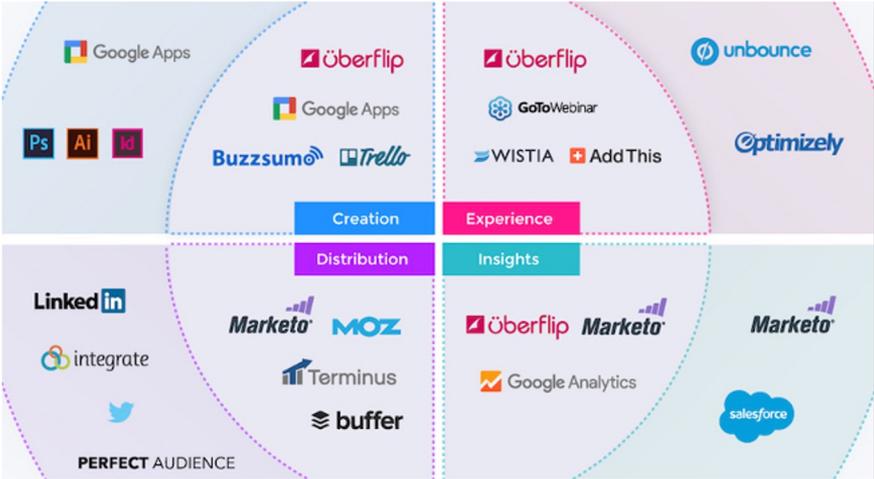
Tools Needed:

- Marketing Automation
- CRM
- Dialer
- Landing Pages
- Content Marketing
- Email Marketing
- Sales Analytics
- Web Analytics
- E-Commerce
- Website CMS
- Design Tools
- Webinar Software
- Community
- Social Media
- Survey Tools

Technical Diagram



Map out your current technology

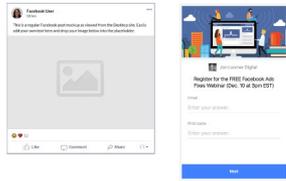


Find platforms that have a lot of capabilities



Marketing Foundation on Zoho One

Social Media



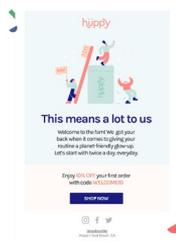
Zoho Social

Website



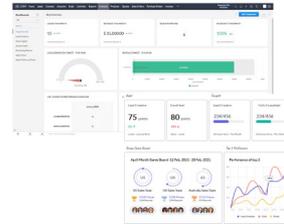
Zoho Forms
Zoho PageSense
Zoho Sites
Zoho SalesIQ
Zoho Commerce

Emails



Zoho MarketingHub
Zoho Campaigns
Zoho Survey

CRM



Zoho CRM
Zoho Bookings
Zoho Motivator
Zoho 3CX

Legal



Zoho Contracts
Zoho Sign

Data



Zoho Analytics
Zoho Flow

Zoho One Ecosystem



3CX **External Integration**
Our 3CX phone system synchronises call and contact data with Zoho CRM.

Marketing Automation

client **success**

Friend,

We hope you're as pumped as we are for this tomorrow's Customer Success Leadership Webinar with Patrick Campbell, CEO/Founder of Protivest!

We're big fans of Patrick. If you've never heard him talk before this will be a great chance to boost your SaaS knowledge. Protivest has done some incredible research into the state of the SaaS ecosystem and he'll be sharing all the trends they've uncovered. His presentation is titled, "Whoever Keeps the Most Customers Wins".

CUSTOMER SUCCESS WEBINAR SERIES

Whoever Keeps the Most Customers Wins

Patrick Campbell
Founder/CEO
Protivest

Actions Settings Performance History

Contact enrollment trigger

Form submission

has filled out Webinar - Using Both Customer Success & Customer Experience to Drive Growth on Any page

Send email

Hi, Michael

Thanks for stopping by. Do you have any questions I can help answer?

Write a message

All Persons

Beginner Ben
OWNER, SMALL BUSINESS

14' 14' 18' 0.2' 1.4'

10 Contacts
91 Leads

10 Keywords
Social Media, News, Economic, Business Owner, Creative

BIO
Beginner Ben is a small business owner who is looking for ways to grow his business and has no real marketing budget.

May 2020

SU	MO	TU	WE	TH	FR	SA
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

- EMAIL SENDS
- BLOG ARTICLES
- SOCIAL POSTS
- FACEBOOK
- LINKEDIN
- TWITTER

DISRUPTIVE (877) 956-7510

76% of PPC ad spend fails to produce a single conversion. You deserve better.

Pay-Per-Click Management That Works

At Disruptive Advertising, your bottom line is our top priority. Unlike 90% of account managers (including most agencies), we optimize our clients' PPC campaigns on a weekly basis.

Get My Free PPC Proposal:

Fill Name: _____
Last Name: _____
Email: _____
Phone Number: _____

Forms

Form Submissions: 33 new, 394 submitted, 344 seen

View Submission Details

Disruptive Advertising

- Newsletter Form
- Request Product Demo Form
- Missing Name
- Self-Service Guide to PPC Advertising
- Webinar - Adm Haker 14
- Adm - Initial Call Bookend
- Adm - Initial Call Bookend
- COVID-19 Economy
- COVID-19 Ecommerce



- Smart Campaigns - Trial
- 00 - Signup - Trial
- 01 - Whitelist Evaluation - Trial
- 02 - Geo Evaluation - Trial
- 03 - Spam Evaluation - Trial
- 04 - Request Product - Trial
- 05a - Webhook Response - ACCEPTED - Trial
- 05b - Webhook Response - UNACCEPTED - Trial
- 05c - Webhook Response - ALREADY REGISTERED - Trial
- 06a - ALREADY REGISTERED - Trial
- 06b - ALREADY REGISTERED - Trial
- 07a - ACCEPTED - Trial
- 07b - UNSUCCESSFUL - Trial
- 07c - REJECTED - Trial
- 08 - Send Alert to Sale
- 08 - Send Alert to Sale
- 09 - STARTED - Trial
- 11 - EXPIRED - Trial
- 11 - Expired - Trial (Convert to Paid)
- 12 - Send Email - License Exists and Expired
- 12 - Send Email - License Exists and Not Expired

Marketing Activities, Design Studio, Database, Analytics, Email Insights, Community, SEO, Marketsky



CRMs

Process Builder - Lead Assignment Rules

Flowchart showing lead assignment logic with steps: Start, Lead, Check if new, Assign to Sharepoint, Confirmed, and Stop.

Q2 2011 Campaign Funnel

Impressions: 83,161,600
Clicks: 142,384
Leads: 14,161
Opportunities: 1,168
Closed Won: 95

Opp Value YTD by Tactic

Tactic	Value
Partners/Affiliates	3,611,149.04
Advertising	1,050,245.96
Search	1,187,830.42
Other	1,296,254.74
Social Media	1,461,837.56
Events	883,676.86
Pay per Click	378,034.27
Sum of Total Value Opportunities in USD	155,291.50

Dashboard Marketing - Month-to-Month

Leads by Day of Month (Line chart)

Opps by Day of Month (Line chart)

Leads by Month (Bar chart)

Opps Created by Month (Bar chart)

Marketing Tactic	Program/Vendor	Records	USD	USD	USD	USD	
Paid Search	Google AdWords	1,245	89	USD 5,205,871.36	1,917	1,878	759
	Google AdWords - Content Network	28	661	USD 5,223,561.00	6,525	8,381	1,162
	Microsoft AdCenter	104	573	USD 4,832,876.27	5,904	7,173	1,033
Partners/Affiliates	Yahoo Paid Search	53	15	USD 3,950.00	184	622	17
	Yahoo Paid Search Content Network	89	45	USD 237,703.74	185	346	70
Advertising	Google AdWords	88	28	USD 163,001.00	252	241	42
	Content Network	89	39	USD 285,960.50	2,154	2,260	50
	Search	89	39	USD 285,960.50	2,154	2,260	50

Deal Insights

NEW LEADS TODAY: 102 (+103.3%)

MONTHLY LEAD COUNT: 2185 (-16.0%)

DEALS IN AGREEMENT SENT: 101

DEALS WON THIS MONTH: 470 (+2.8%)

REVENUE THIS MONTH: \$ 43,555.00 (-48.6%)

DEALS BY STAGES (Bar chart)

OPEN AMOUNT BY USERS (Table)

Send From Contact

```

Function Description
void SendFrom_Contact(String contact_email,String contact_phone,int uid,...)
BASIC
1  np = New();
2  set variable: np.put("email",contact_email);
3  np2 = New();
4  np2.put("Phone",contact_phone);
5  np2.put("Contact_Owner",contact_owner);
6  update = zoho.crm.updateRecord("Texts",text_id,np);
7  update = zoho.crm.updateRecord("Texts",text_id,np2);
8  myMap = Map();
9  myMap.put("Email",contact_email);
10 myMap.put("Phone",contact_phone);
11 myMap.put("Message",text_message);
12 myMap.put("Contact_Owner",contact_owner);
13 if(contact_owner == "John Kemp")
14 {
15  resp = postIn("https://hooks.zapier.com/hooks/catch/221663/77d88a/*",myMap);
        
```

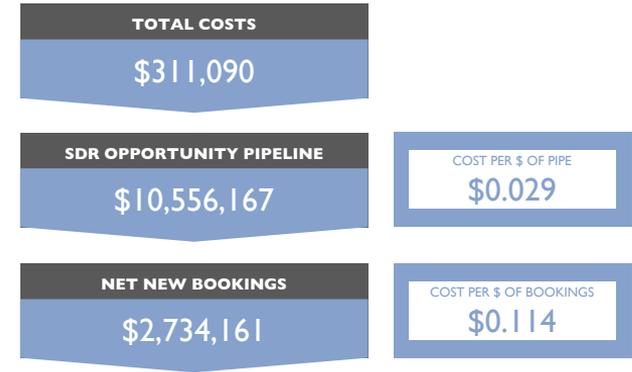
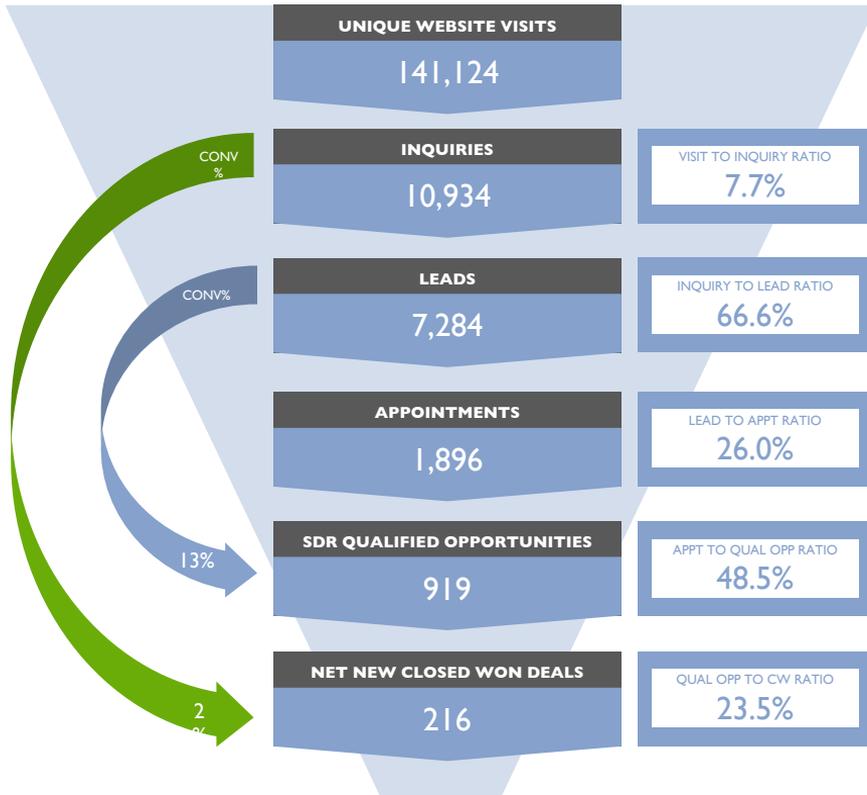
1 - Appointment Missed

Workflow diagram showing a condition: Stage is Appointment Not Held, leading to an action: Dear Owner is Guillermo Casacian.



Campaign Tracking and Reporting

Understand the Marketing & Sales Funnel



TIME TO CONVERT



Define the Success Metrics & Create a Process for Measuring Them

- Define the Success Metrics / KPIs:
 - Revenue
 - # of Customers
 - Average Order Value
 - Lead-to-Close Ratio
 - Time to Close
 - Net Promoter Score (NPS)
 - Profit Margin
 - ROI
 - Cost to Acquire a Customer (CAC)
- Set a Baseline
- Measure them often. At least monthly.

Marketing Funnel	January	February
Ad Impressions	3,840,548	3,712,766
Ad Clicks	41,526	42,800
Ad Conversions	612	913
New Leads	478	672
Marketing Qualified Leads	36	51
Sales Qualified Leads	11	20
New Opportunities	4	6
Closed Won Opportunities	2	3
New Business Pipeline	\$45,200	\$62,000
New Closed Business	\$22,000	\$33,500
Total Spend	\$15,651	\$18,365
Cost / MQL	\$434.75	\$360.10
Cost / Opp	\$3,912.75	\$3,060.83
Return on Ad Spend	1.4	1.8
Clickthrough Rate	1.08%	1.15%
Ad Conversion Rate	1.47%	2.13%
Conversion-to-Lead Rate	78.10%	73.60%
Lead-to-MQL Rate	7.53%	7.59%
MQL-to-Opp Rate	30.56%	39.22%
Opp-to-Close Rate	36.36%	30.00%
Average Opp Value	\$11,300	\$10,333
Average Order Value	\$11,000	\$11,167

Measuring Success in Marketing

Overall Marketing:

Total Revenue
Cost to Acquire a Customer
Qualified Leads
Lead-to-Close Ratio

Brand/PR Growth:

PR Scorecard Growth
Direct Traffic Leads
Referral Traffic Leads
Branded Search Leads

SEO Lead Growth:

Non-Branded Search Leads
Organic Impression Share
Organic Clicks
Website Conversion Rates

Operational Metrics:

New Lead Revenue
Overall Lead Gen Costs
Overall # Qualified Leads
Cost per Qualified Lead
Cost per Opportunity
Lead-to-Opp Ratio
Average deal size
Sales cycle length

Online Channel Metrics:

Ad Click Through Rates
Landing Page Conv. Rates
Cost per Lead
Cost per Qualified Lead
Qualified Leads

Lead Database Marketing:

Revived Leads
Lead Engagement Score
Lead-to-Opp Ratio

New Channel Development:

Test budget metrics
Test channel efficiencies
New Channels

Partner Marketing Metrics:

Partner Pitches
New Partners
Qualified Leads
Lead Growth within Existing

Customer Marketing:

Customer Renewal Rates
NPS Score
Ave. LTV of Customer
Customer Lifetime Length
Customer Referrals

Internal Marketing:

Awards
Brand Survey Score
Activities
Employee Retention

Campaign Funnel Dashboards

YTD Leads by Program/Vendor

Program/Vendor	Sum of Total Leads
Google AdWords	7,202
Ganththead	4,565
Google AdWords - Content Network	2,882
Webinar	1,879
AtTask Newsletter	1,815
Projects @Work	1,689
IT Toolbox	1,260
Web-Based-Software	942
Direct	658
CBS Interactive	540
AtTask Blog	364
	355
Microsoft AdCenter	345
Trade Show	338
Yahoo Paid Search	245
Capterra	237
TopTenReviews	229
LinkedIn	173
Salesforce AppExchange	167
Facebook	128
Organic Search	96
Business.com	49
Unknown	45
Twitter	5
GetApp	4
Article Directories	2
Referring Site	2
User Conference	2
Affiliate	0

YTD Opportunities by Program/Vendor

Program/Vendor	Sum of Num Total Opportunities
Google AdWords	570
Ganththead	193
Web-Based-Software	135
Direct	122
AtTask Newsletter	98
Webinar	88
IT Toolbox	70
Projects @Work	63
TopTenReviews	55
Google AdWords - Content Network	54
Capterra	47
Microsoft AdCenter	44
Facebook	33
LinkedIn	33
AtTask Blog	32
Yahoo Paid Search	28
	24
Trade Show	23
CBS Interactive	14
Salesforce AppExchange	13
Organic Search	10
Business.com	8
Unknown	4
User Conference	3
Twitter	1
Affiliate	0
Article Directories	0
GetApp	0
Referring Site	0

Q2 2011 Campaign Funnel

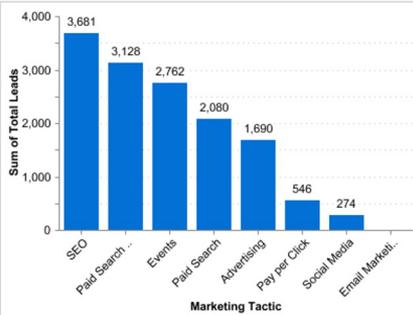
Impressions:	83,161,600
Clicks:	142,384
Leads:	14,161
Opportunities:	1,168
Closed Won:	95

Opp Value YTD by Tactic

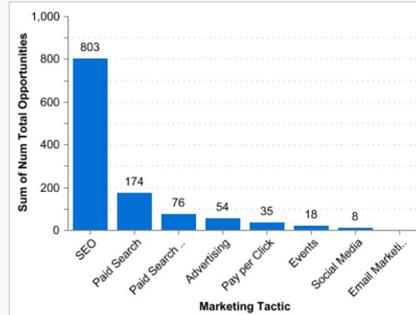


Example Dashboard

QTD Leads by Marketing Tactic



QTD Opportunities by Marketing Tactic



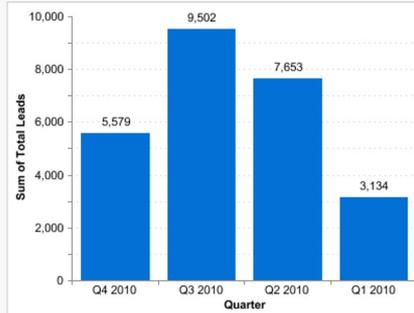
Highest Cost per Lead

Program/Vendor	Average Cost per Lead
Business.com	USD 450
GetApp	USD 167
LinkedIn	USD 67
Web-Based-Software	USD 41
Capterra	USD 38
CBS Interactive	USD 29
Google AdWords - Content Network	USD 10
Google AdWords	USD 7
Microsoft AdCenter	USD 6
Article Directories	USD 0

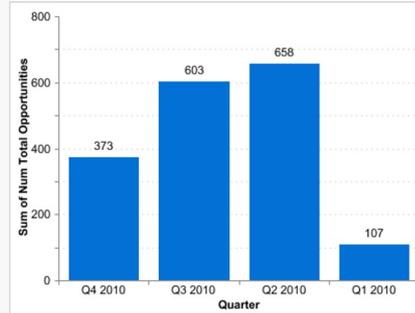
Highest Cost per Opportunity

Program/Vendor	Average Cost per Opportunity
CBS Interactive	USD 1,100
Google AdWords - Content Network	USD 490
Web-Based-Software	USD 450
LinkedIn	USD 420
Capterra	USD 210
Google AdWords	USD 118
Microsoft AdCenter	USD 49
AtTask Blog	USD 0
AtTask Newsletter	USD 0
Direct	USD 0

Leads by Quarter



Opportunities by Quarter



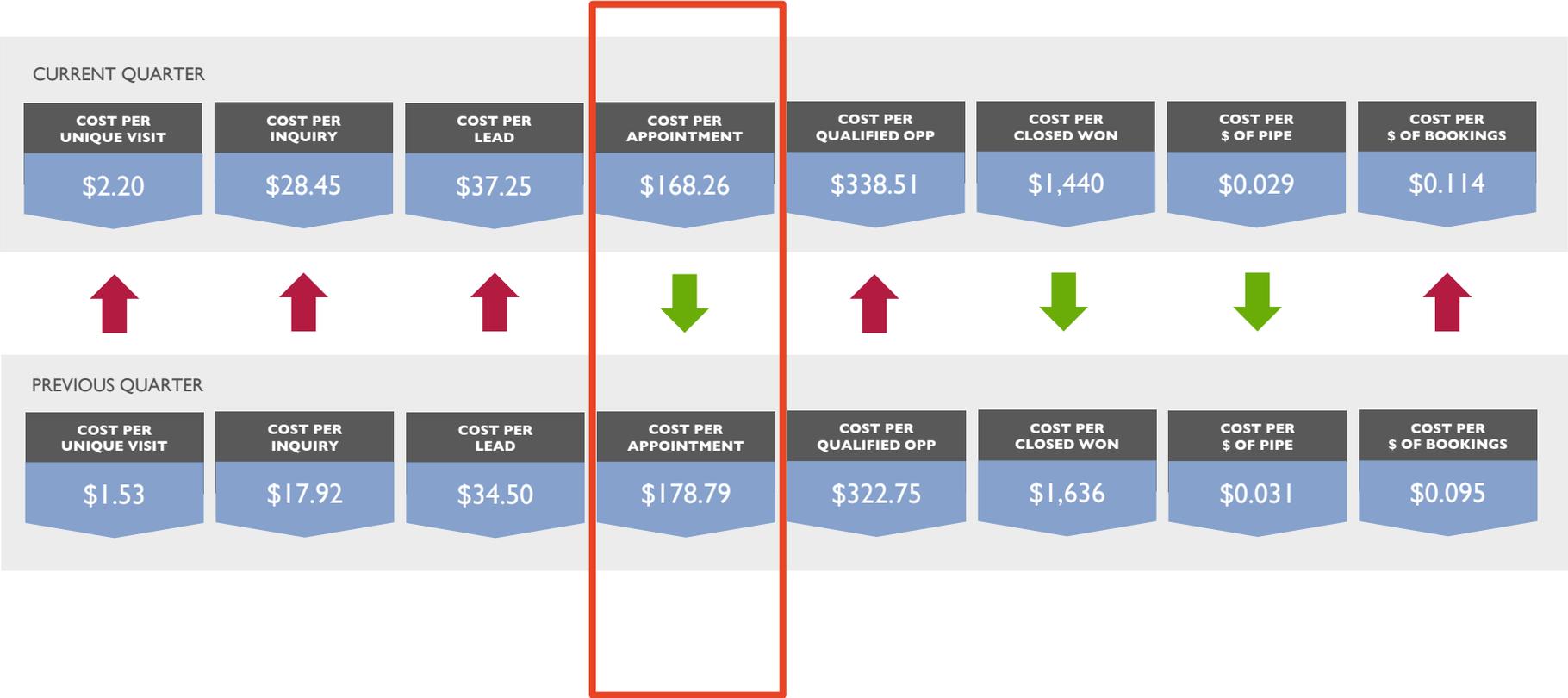
Top 5 YTD Campaigns

Program/Vendor	Sum of Total Value Won Opportunities
Google AdWords	USD 625K
Ganthead	USD 218K
Direct	USD 173K
Webinar	USD 105K
AtTask Newsletter	USD 101K

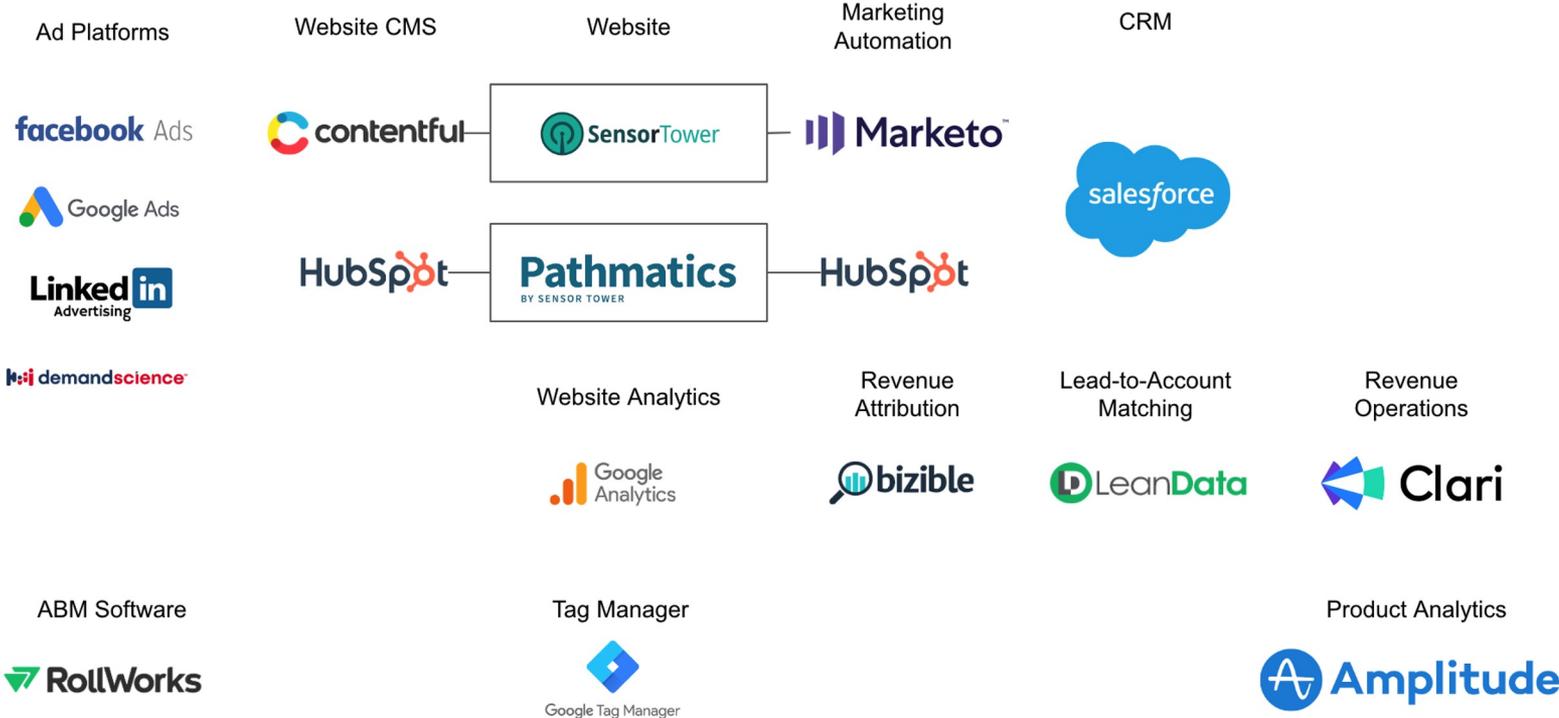
Top 10 YTD Opportunity Campaigns

Program/Vendor	Sum of Total Value Opportunities
Google AdWords	USD 3.3M
Direct	USD 969K
Ganthead	USD 931K
AtTask Newsletter	USD 742K
Web-Based-Software	USD 630K
Webinar	USD 616K
Capterra	USD 512K
TopTenReviews	USD 286K
IT Toolbox	USD 245K
Projects @Work	USD 227K

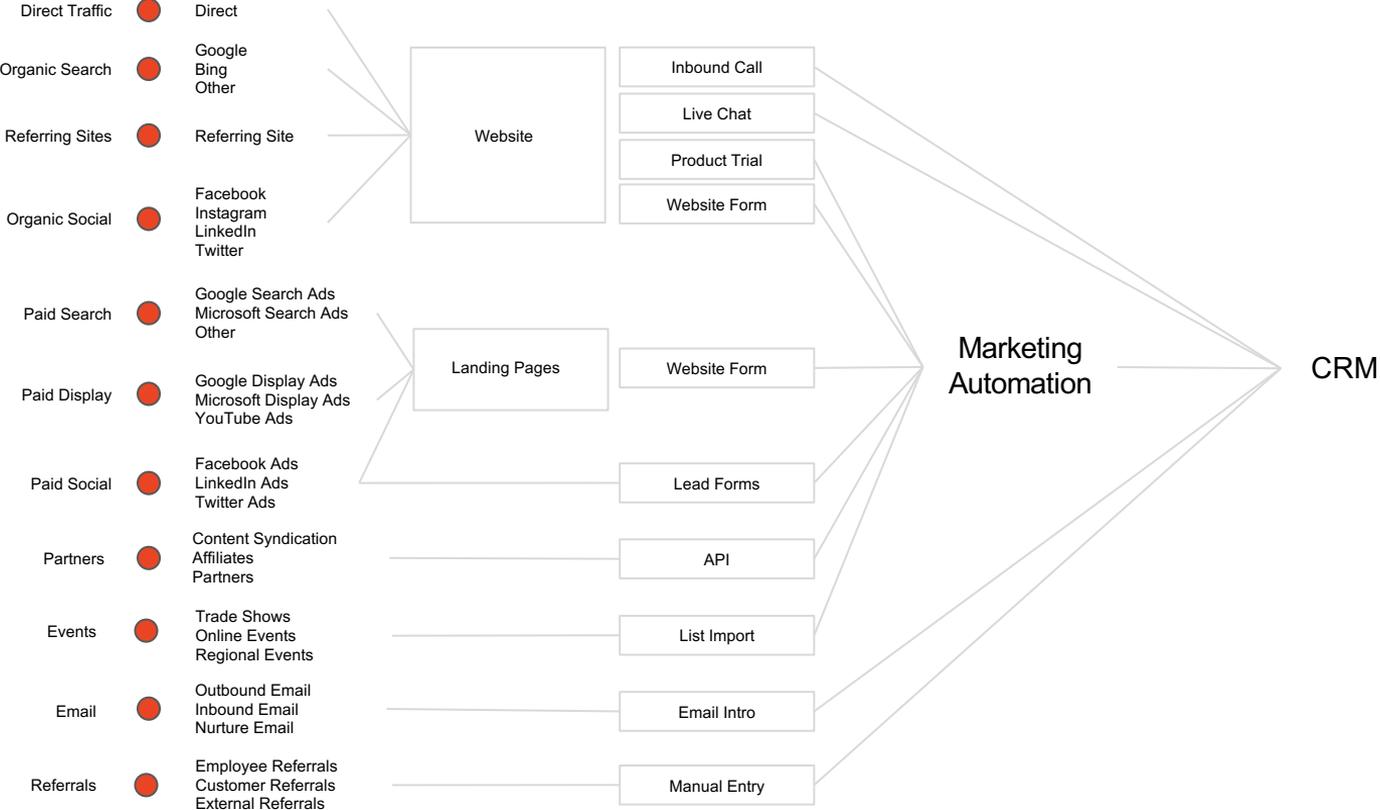
Focus on the lowest part of the funnel that Marketing can influence



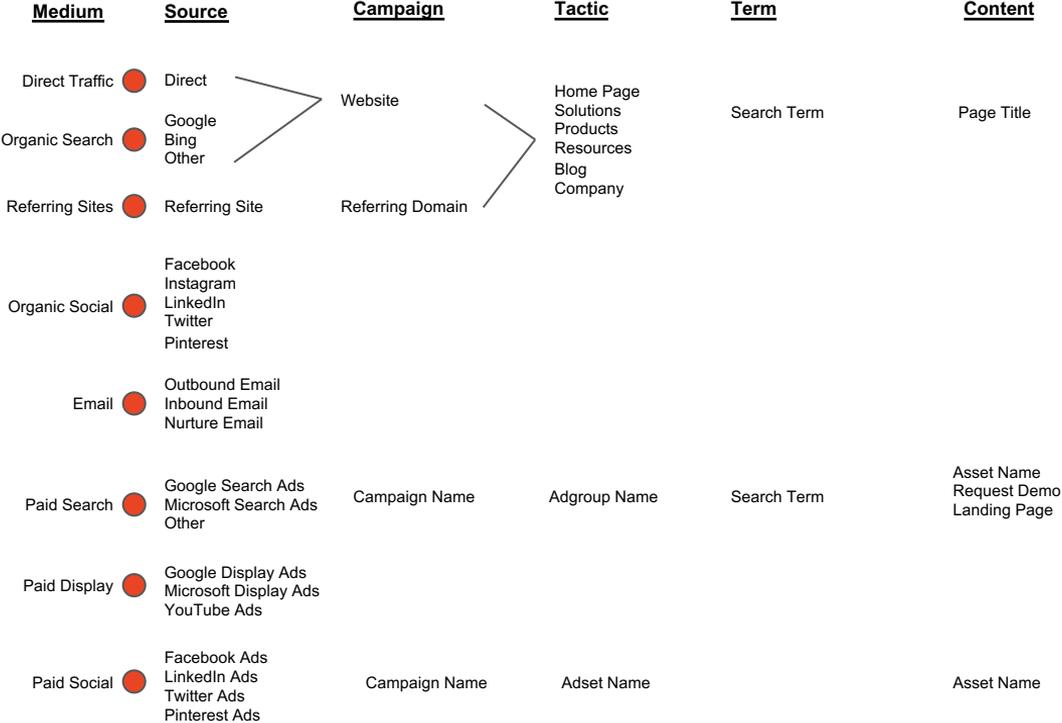
Understand the flow of data



Leads enter the CRM from a variety of sources



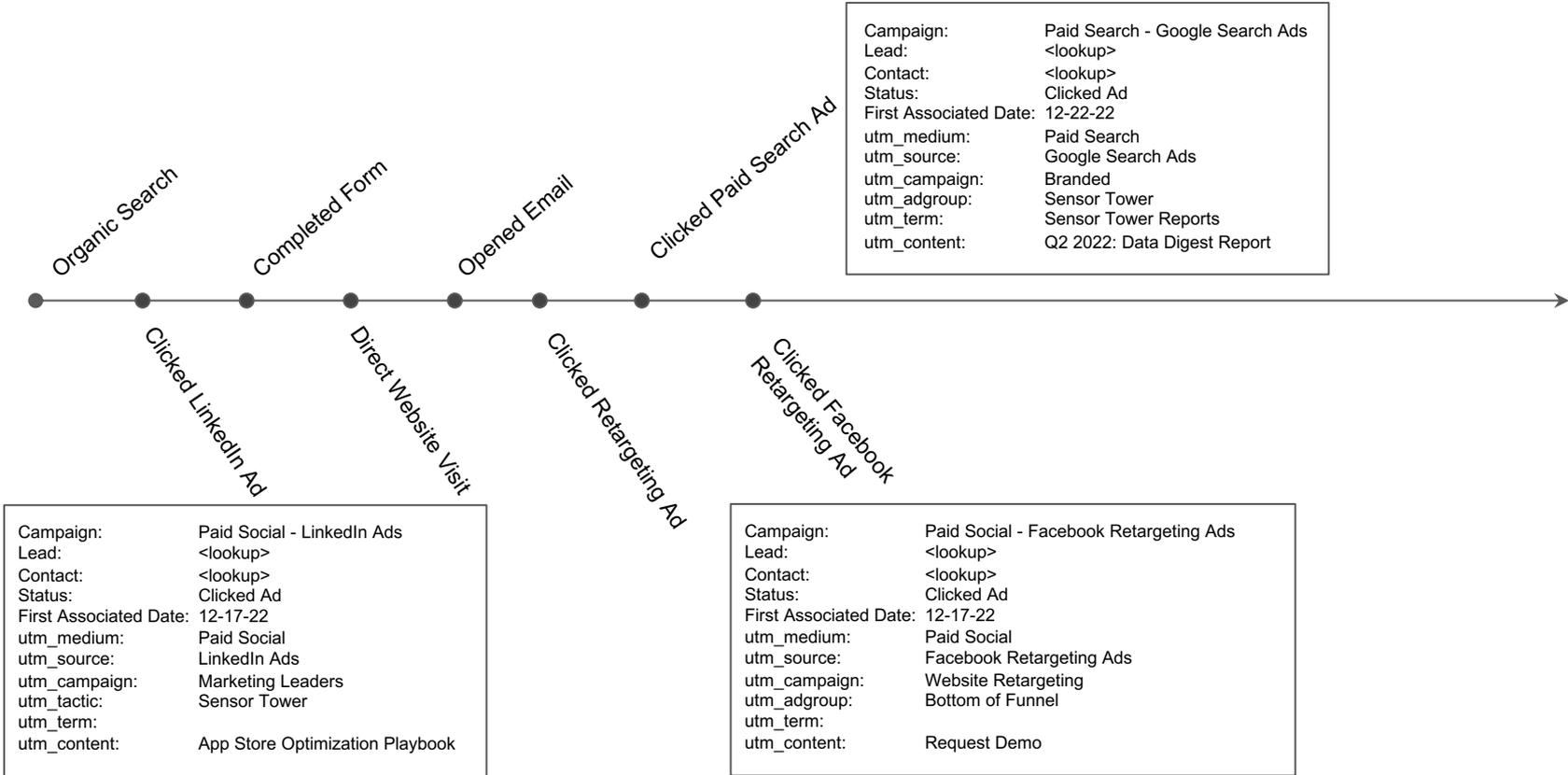
Track Original Source with UTM Values



Keep things organized with UTM tracking structure

Salesforce Campaign Object			UTM Examples					
Type	Tactic	Salesforce Campaign	utm_medium	utm_source	utm_campaign	utm_adgroup	utm_term	utm_content
Website Direct	Direct Traffic	Website Direct - Direct Traffic	website-direct	direct-traffic	website.com	website-section	website-page	form-or-offer
Organic Search	Google	Organic Search - Google	organic-search	google	website.com	website-section	website-page	form-or-offer
Organic Search	Bing	Organic Search - Bing	organic-search	bing	website.com	website-section	website-page	form-or-offer
Organic Search	Other	Organic Search - Other	organic-search	other	website.com	website-section	website-page	form-or-offer
Referring Sites	Referring Site	Referring Sites - Referring Site	referring-site	referring site	website.com	website-section	website-page	form-or-offer
Organic Social	Facebook	Organic Social - Facebook	organic-social	facebook	social-feed			form-or-offer
Organic Social	Instagram	Organic Social - Instagram	organic-social	instagram	stories			form-or-offer
Organic Social	LinkedIn	Organic Social - LinkedIn	organic-social	linkedin	company-page			form-or-offer
Organic Social	Twitter	Organic Social - Twitter	organic-social	twitter	influencer			form-or-offer
Organic Social	TikTok	Organic Social - TikTok	organic-social	tiktok	video			form-or-offer
Organic Social	SnapChat	Organic Social - SnapChat	organic-social	snapchat	social-feed			form-or-offer
Organic Social	Pinterest	Organic Social - Pinterest	organic-social	pinterest				
Organic Social	Youtube	Organic Social - Youtube	organic-social	youtube				
Paid Social	Facebook Ads	Paid Social - Facebook Ads	paid-social	facebook-ads	campaign-name	adset-name	audience	content-offer
Paid Social	LinkedIn Ads	Paid Social - LinkedIn Ads	paid-social	linkedin-ads	campaign-name	adset-name	audience	content-offer
Paid Social	Twitter Ads	Paid Social - Twitter Ads	paid-social	twitter-ads	campaign-name	adset-name	audience	content-offer
Paid Social	TikTok Ads	Paid Social - TikTok Ads	paid-social	tiktok-ads	campaign-name	adset-name	audience	content-offer
Paid Search	Google Search Ads	Paid Search - Google Search Ads	paid-search	google-search-ads	campaign-name	adgroup-name	keyword	content-offer
Paid Search	Microsoft Search Ads	Paid Search - Microsoft Search Ads	paid-search	microsoft-search-ads	campaign-name	adgroup-name	keyword	content-offer
Paid Display	Google Display Ads	Paid Display - Google Display Ads	paid-display	google-display-ads	campaign-name	adgroup-name	audience	content-offer
Paid Display	Microsoft Display Ads	Paid Display - Microsoft Display Ads	paid-display	microsoft-display-ads	campaign-name	adgroup-name	audience	content-offer
Paid Display	Google Retargeting Ads	Paid Display - Google Retargeting Ads	paid-display	google-retargeting-ads	campaign-name	adgroup-name	audience	content-offer
Paid Display	Microsoft Retargeting Ads	Paid Display - Microsoft Retargeting Ads	paid-display	microsoft-retargeting-ads	campaign-name	adgroup-name	audience	content-offer
Partners	Partner 1	Partners - Partner 1	partners	partner-1				form-or-offer
Partners	Partner 2	Partners - Partner 2	partners	partner-2				form-or-offer
Events	Trade Shows	Events - Trade Shows	events	trade-shows	event-name	booth		form-or-offer
Events	User Conference	Events - User Conference	events	user-conference	event-name	speaker-session		form-or-offer
Events	Recruiting Event	Events - Recruiting Event	events	recruiting-event	event-name	event-date-session	incentive	form-or-offer
Referrals	Employee Referrals	Referrals - Employee Referrals	referrals	employee-referrals	department	employee-name		form-or-offer
Referrals	Customer Referrals	Referrals - Customer Referrals	referrals	customer-referrals	referral-email	customer-name		form-or-offer
Referrals	External Referrals	Referrals - External Referrals	referrals	external-referrals	external	external-name		form-or-offer
Email Marketing	Newsletter Blast	Email Marketing - Newsletter Blast	email-marketing	newsletter	adventure-updates			
Email Marketing	Automations	Email Marketing - Automations	email-marketing	email-automation				

Campaign Tracking allows for Multi-touch Attribution



Marketing Campaigns

Your Ideal Client Profile

spingo EVENT MAKER PERSONA



PROFESSIONAL PAUL

Director of Development and Communications, Beacon Group

NON-PROFIT

VOLUNTEER

CORPORATE

PROFESSIONAL

AGENCY

I work for a company specializing in events

"I got my hand in a lot of cookie jars. I would love to know of one place where I can hit my target demographic. I feel like I'm spread thin going to lots different places."

SALES

Overview

Event Passion

 Doesn't care much | Cares greatly

Estimated Event Budget

 \$25 | \$25,000

Event Promotion Timeline

 180 days | 90 days | 30 days | 2 weeks | 1 week | Event date

Behaviors
 An expert in event management
 "It worked before it will work again"
 Organizes multiple events each year
 Works long days and weekends
 Very versed in online marketing
 Works with large sponsors
 Thinks he knows his target audience
 Juggles events at the same time

How to Sell
 We are an expert in event promotion
 Let's do a test. Start small, go big.
 Become a partner, let's do this together
 We can save time and relieve stress
 Guaranteed clicks (match CPC's)
 We can target multiple states
 Validate his expertise, offer targeting
 Focus on the event, we'll handle promotion.

Buying Roles

Submitter Title: Event and Program Specialist, PR Specialist, Social Media Coordinator, Marketing Specialist. Duties: Plans large scale events, works with many vendors to execute.	Decision Maker Title: Director of Development, VP of Communications, Marketing Director, Owner. Duties: Oversees the production of the event, manages budget, and approves strategy.
--	---

MARKETING

Demographics

Age:
25-50 years old

Personality:
Confident, enthusiastic, involved, candid, and witty.

Event Types:
Large nationwide events, concerts, expos, mainstream sports, races, fun runs, arts, entertainment, festivals, rodeos, public sports events, fairs, cultural events, conferences, and tradeshows.

Industries:
Convention and tradeshows, event planning services, promoters of arts, entertainment, sports and media.

Web Behavior
 Uses all social media
 Reddit
 Pollstar
 Buzzfeed
 Bloggers

Common Searches
 Event venues
 Community calendars
 Online marketing
 Promote my event online
 Event planning tools
 Conferences for meeting planners

Things They Care About
 Increasing audience with fan base
 What's hot / hip / cool
 Ticketing solutions
 Latest social media trends
 Building brand integrity
 Likes infographics

PRODUCT

Overview

Reporting Expertise

 Doesn't care much | Tracking

Technical Knowledge

 Very basic solutions | Complex marketing

Number of Events per Year

 20+ | 5-19 | 4 or less

User Environment
 Employed full-time
 Works in a medium-sized office
 Member of a team, 1-10 members
 Tools Used: Email, Microsoft Office, Google Docs, Google Analytics, Project Management tools, Email Service Providers, and Point of Sale systems.

User Behavior
 Ticketing solutions
 Tracking
 Attribution surveyed online during ticket process
 Appreciates good design
 Likes checklists
 Plans multiple events
 Measures campaign success with attendance
 Researches venues (e.g. parks exposition centers, areas, etc.)
 Finding sponsors
 Hard time keeping employees (w/specialized skills)

Ideal Client Profile (ICP)

- Large nationwide events, concerts, expos, sporting events, races, festivals, rodeos, fairs, conferences
- Owner, Director of Development, VP of Communication, Marketing Director

Where does your buyer persona hang out?



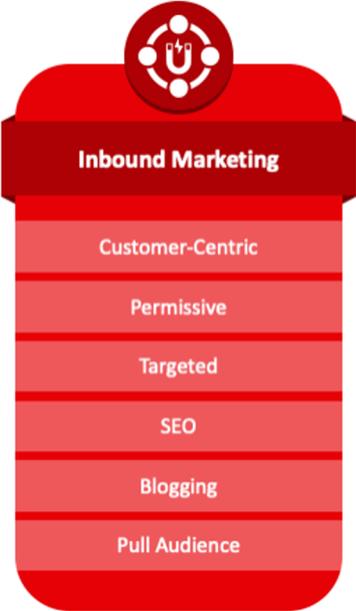
Offline

- Home
- Office
- Events
- Stores

Online

- Social Media
- Email
- Associations
- YouTube

Outbound vs. Inbound Marketing



Be there when people are searching for you

Google home security lehi

About 3,250,000 results (0.61 seconds)

Results for **Lehi, UT** · Choose area

Sponsored

Vivint
https://www.vivint.com

Smart Home Security Systems - Utah | Vivint
Customizable Packages for less than \$1/day. Response in Seconds. Call Now! Vivint Smart Home makes life simple. Call now for professional installation! Control Your Home.
Compare Security Packages · Build Your Perfect System · Shop Now · Compare Vivint

Places · Rating · Hours

SecureUtah Inc (Utah Home Security & Alarms)
No reviews · Security system supplier
2528 N Elm Dr · (801) 477-5277

AMP Smart
4.4 ★★★★★ (3.4K) · Security system supplier
3450 Triumph Blvd Suite 100 · (800) 817-3918
Open · Closes 7 PM
"I would recommend to those who are looking for home security."

Fluent Home
https://www.fluenthome.com › utah › lehi

Home Security & Automation Systems in Lehi
FluentAre you looking for a home security system in Lehi, UT? Fluent Home is here to provide you with a customized solution. Contact us now!

The map shows several local businesses in Lehi, UT, including Stage 2 Security, Outlets at Traverse Mountain, Strap Tank Brewery, Chick-fil-A, Hyatt Place Salt Lake City/Lehi, AMP Smart, NorthStar Home, Vivint, and HEROIC Cybersecurity.

← Paid Ad

← Local SEO

← Organic Listing

Perform Keyword Research



Locations: United States Language: English Search networks: Google Last 12 months May 2019 – Apr 2020

Q dry skin [DOWNLOAD KEYWORD IDEAS](#)

Broaden your search: [+ skin problem](#) [+ skin](#) [+ skin type](#) [+ eczema](#) [+ skin irritation](#) [+ moisturizer](#) [+ common skin problem](#)

Search volume trends

▼ Exclude adult ideas ADD FILTER Showing 832 of 1,241 keyword ideas

<input type="checkbox"/> Keyword (by relevance) ↓	Avg. monthly searches	Competition	Ad impression share	Top of page bid (low range)	Top of page bid (high range)	Account status
Keywords you provided						
<input type="checkbox"/> dry skin	40,500	Medium	–	\$2.40	\$3.81	
Keyword ideas						
<input type="checkbox"/> dry brushing	33,100	High	–	\$0.53	\$2.24	
<input type="checkbox"/> best moisturizer for dry ...	18,100	High	–	\$1.45	\$4.22	
<input type="checkbox"/> dry skin on face	18,100	High	–	\$1.16	\$3.76	
<input type="checkbox"/> scaly skin	14,800	Low	–	\$3.12	\$5.58	
<input type="checkbox"/> best lotion for dry skin	14,800	High	–	\$3.00	\$5.20	
<input type="checkbox"/> dry hands	18,100	High	–	\$1.19	\$12.65	
<input type="checkbox"/> moisturizer for dry skin	8,100	High	–	\$2.00	\$4.72	
<input type="checkbox"/> flaky skin	8,100	Low	–	\$0.65	\$3.74	
<input type="checkbox"/> dehydrated skin	5,400	High	–	\$4.16	\$7.12	
<input type="checkbox"/> dry feet	8,100	High	–	\$0.57	\$2.02	

Refine keywords BETA ×

[EXPAND ALL](#) [RESET](#)

Brand or Non-Brand ▼
31 excluded: eucerin, neutrogena, dove, nivea...

Product ▲

Product	Keywords
<input checked="" type="checkbox"/> cream	403
<input checked="" type="checkbox"/> skin cream	403
<input checked="" type="checkbox"/> moisturizer	390
<input checked="" type="checkbox"/> lotion	339
<input checked="" type="checkbox"/> skin lotion	339
<input type="checkbox"/> cleanser	
<input type="checkbox"/> body wash	
<input checked="" type="checkbox"/> gel	18
<input checked="" type="checkbox"/> face scrub	8
<input type="checkbox"/> butter	

[VIEW 1 MORE](#)

Body Part ▼
face, feet, hands, eyes, lips

Skin Type ▼
6 excluded: sensitive skin, normal skin, oily s...

Symptom ▲

Symptom	Keywords
<input checked="" type="checkbox"/> dryness	69
<input type="checkbox"/> itching	
<input type="checkbox"/> Other	

Condition ▲

Condition	Keywords
<input type="checkbox"/> acne	
<input type="checkbox"/> dry eczema	

Launch Paid Search Ads



Ad · <https://www.xmatters.com/free>

xMatters.com - xMatters - Free - Get xMatters - Free, forever

Powerful Incident Response at the Push of a Button for Always-On Services. Resolve Incidents and Launch Workflows at the Push of a Button. Integration Platform.

Start xMatters Free

Turn Your Systems' Insights into Actionable Alerts During Disruption

Incident Management

The Next Stage In Incident Mgmt Is Here. Download The White Paper.

Contact Sales

Request a meeting with an xMatters Solution Specialist.

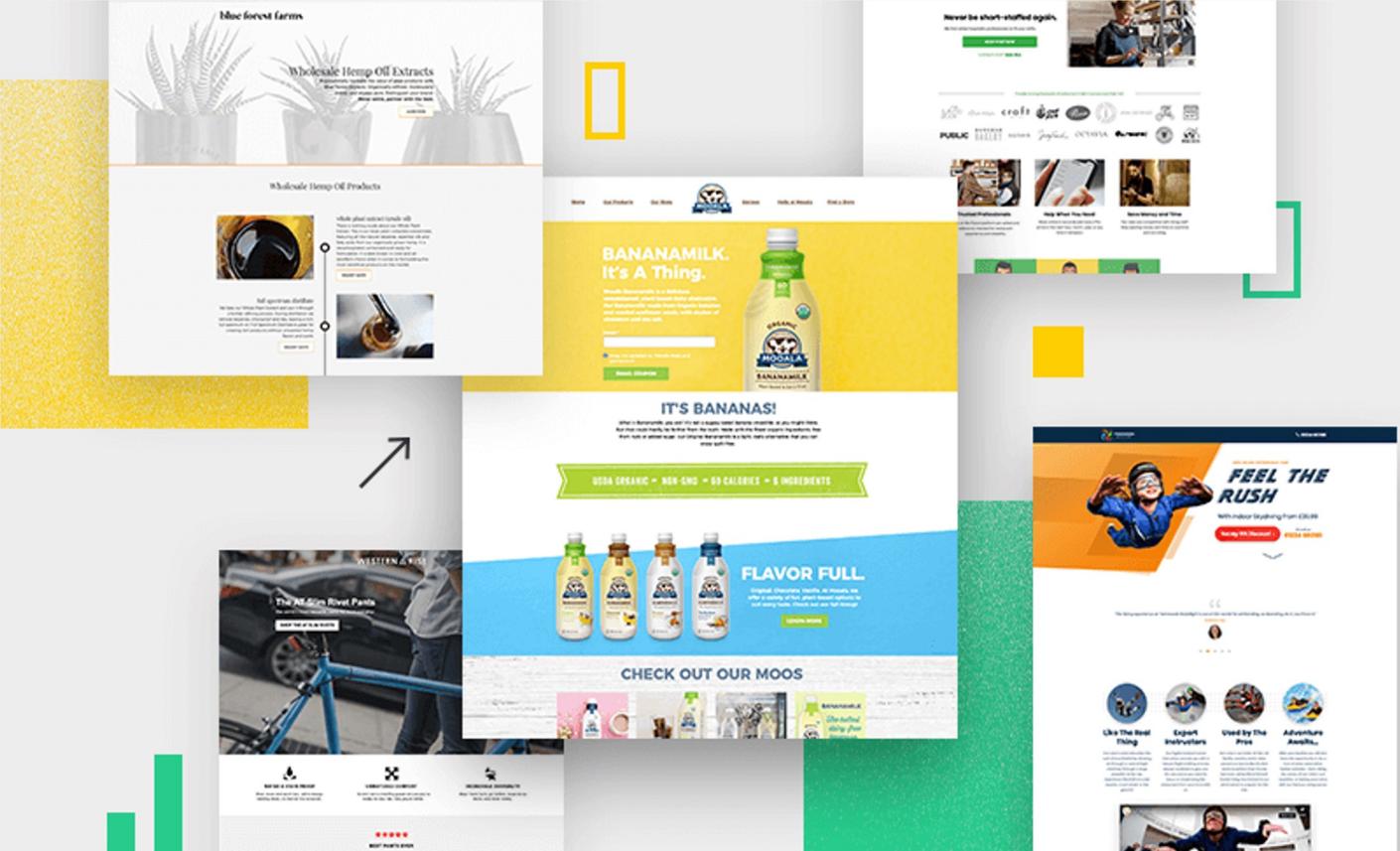
Adaptive Incident Mgmt

Learn Where You Rank And How It Affects Your Digital Service.

The advertisement features the xMatters logo (an orange 'X' shape) and the text 'xMatters AN EVERBRIDGE COMPANY'. Below this, it says 'Automate. Collaborate. Analyze.' and 'Adaptive incident management keeps services reliable'. At the bottom, there is a white button with the text 'Try xMatters Free'. The background is black with a blue and orange wave graphic at the bottom right.

Conversions	Cost / conv.
12,188.40	\$139.89

Create Great Landing Pages



Search Engine Optimization (SEO)



Page Elements	Optimization Rate	Up
Page Title	71.5%	Yellow
Meta Description	65.8%	Yellow
Meta Keywords	49.5%	Yellow
Body	73.5%	Green
H1 Headings	16.9%	Red
Bold Text Blocks	43.3%	Orange
Anchor Texts	54.3%	Orange
Image Alt Texts	47%	Orange
Entire Page	50.8%	Orange

Project Planning Software

Project planning software from AtTask makes scheduling and executing projects easy and intuitive. AtTask provides a business-to-business tool that streamlines resource management, and enables project managers and users to gain managers complete visibility to manage and bring projects to on-time and on-budget.

Project Planning Programs

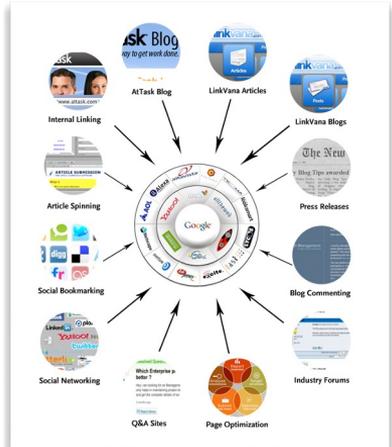
AtTask's project planning programs include more than 10 standard reports and unlimited configuration, providing a complete, integrated, and project-based tool to be shared by the project team. AtTask's project planning programs include more than 10 standard reports and unlimited configuration, providing a complete, integrated, and project-based tool to be shared by the project team.

Project Dashboard

Project Dashboard provides a comprehensive overview of your project portfolio. It includes a variety of charts and reports, such as Gantt charts, PERT charts, and resource histograms, to help you track project progress and manage resources effectively.

Project Planning Software compared to Free

AtTask's project planning software is better than a free project planning software tool because it allows you to add and edit tasks in real time from any device. It also provides a rich set of features, such as resource management, that are not available in free tools.

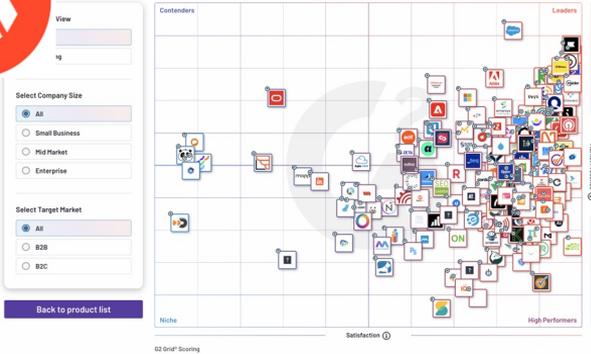


Add Your Product to Review Sites



Q2 Grid for Marketing Automation

Q2 Grid® for the top Marketing Automation Software products. Q2 scores products and sellers based on reviews gathered from our user community, as well as data from online sources and social networks. Together, these scores are mapped on our proprietary Q2 Grid®, which you can use to compare products, streamline the buying process, and identify the best products based on the experiences of your peers.





Klaviyo [By Klaviyo](#)

4.7 (345)

TOP PERFORMER / 2023 [VIEW THE CAPTERRA SHORTLIST](#) →

Klaviyo is a unified customer platform that gives your online brand direct ownership of your consumer data and interactions, empowering you to turn transactions with customers into productive long-term relationships-at scale. Because the Klaviyo database integrates seamlessly with your tech stack, you can get the full story on every customer that visits, and then-from the same platform-use those insights to automate personalized email and SMS communications that make people feel seen. [Learn more about Klaviyo](#)

[COMPARE](#) [SAVE](#)

[VISIT WEBSITE](#)



Leaders Matrix Packages Pricing Sort by Sponsored

Client Budget Hourly Rate Industry Reviews All Filters Clear All



Disruptive Advertising Top-Rated PPC & Digital Marketing Agency

4.8 (340 REVIEWS)

VERIFIED

\$5,000+

\$100 - \$149 / hr

50 - 249

Pleasant Grove, UT

Service Focus

70% Pay Per Click

"Disruptive Advertising takes a holistic approach to our digital advertising strategy"

VP & Partner, Phone Ninjas

[Visit Website](#)

[View Profile](#)

[Contact](#)



Best Company



ROK Financial

#1 Overall

VERIFIED PARTNER

9.9 Overall Score

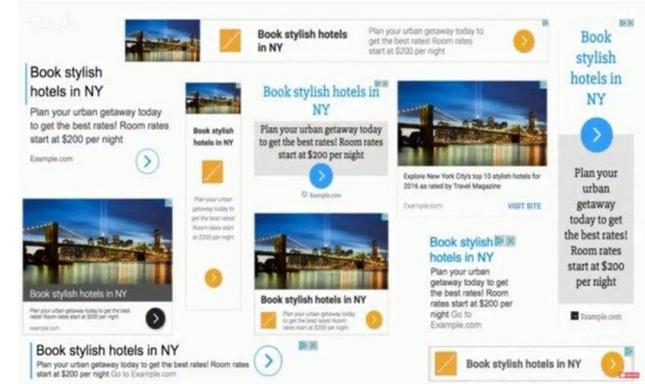
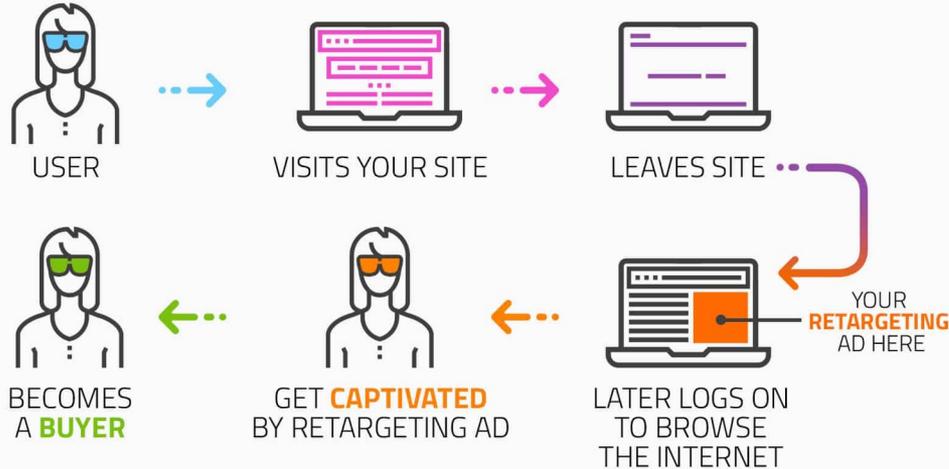
- Flexible Funding Options
- Higher Loan Minimums and Maximums
- Potentially Funded on the Same Day

[View Profile](#) [Visit Site](#)

290 User Reviews 1 week ago

Run Retargeting Ads

WHAT IS RETARGETING?



Paid Social Ads



ClientSuccess
10,333 followers
Promoted

Join us every Tuesday in August at 1:00 PM Eastern for a hands on Customer Success best practices bootcamp, with Kristi Falorusso, VP of Cus ...see more

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP WEBINAR SERIES
Every Tuesday in August at 1:00 PM Eastern / 10:00 AM Pacific

Kristi Falorusso
VP of Customer Success
ClientSuccess

- Aug. 3 - How to Design Your Customer Journey
- Aug. 10 - Moving to a Partnership Kickoff Framework
- Aug. 17 - Anatomy of a High Performing Health Score
- Aug. 24 - Creating a Renewal Process and Revenue Forecast Model
- Aug. 31 - Architecting Your Customer Success Interview Process

brought to you by **clientSUCCESS**

Free Customer Success Leadership Bootcamp
clientsuccess.com

[Register](#)

Like Comment Share

Leads	Cost Per Lead
5,550	\$9.56

ClientSuccess
15,650 followers
Promoted

The role of a customer success leader is to lead the customer success (CS) team, represent the CS Team in executive meetings, and champion th ...see more

FREE EBOOK: HOW TO BECOME AN ELITE CUSTOMER SUCCESS LEADER

[DOWNLOAD NOW](#)

clientSUCCESS

How to Become an Elite Customer Success Leader
clientsuccess.com

[Download](#)

Like Comment Share



American Energy Association
Sponsored · 10

Get New Appliances for FREE with the Purchase of Solar Panels. Apply Here to Learn More! Lock in the Tax Credits ...See More

GO SOLAR NOW AND GET FREE APPLIANCES THROUGH AMERICAN ENERGY ASSOCIATION

We Have A Unique Program To Help Customers Get Appliances For FREE With New Solar Panels!

FORM ON FACEBOOK FREE APPLIANCES WITH PURCHASE OF SOLAR PANELS [GET OFFER](#)

Like Comment



Cransten Service All Stars
Sponsored · 10

Need help remodeling your bathroom or kitchen? Or just need a handyman for a few quick projects? No task is too big ...See more

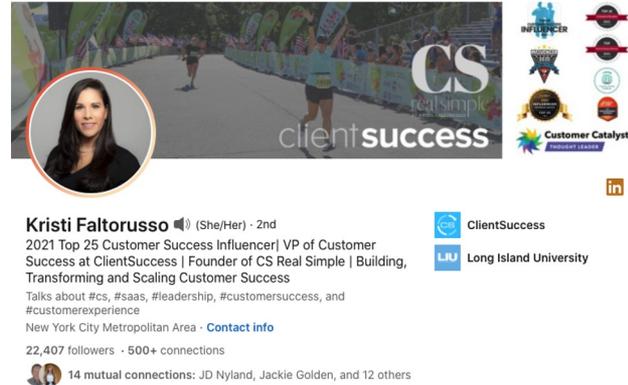
FORM ON FACEBOOK Handyman and Remodeling [Get quote](#)

Like Comment

459	On-Facebook Leads
\$9.25	Per On-Facebook Leads

Social Media Thought Leadership

- Post daily on LinkedIn from personal accounts
 - Share blog posts
 - Share quotes
 - Share articles
 - Ask survey questions: great for product research
 - Share video snippets from webinars
 - Tag individuals and ask for their input
 - Promote upcoming webinars
 - Share & comment on corporate posts
- Create a calendar and schedule out posts for 30-90 days at time
- Expand your following with automated connections
- Comment on popular or trending posts



Kristi Faltorusso (She/Her) · 2nd

2021 Top 25 Customer Success Influencer | VP of Customer Success at ClientSuccess | Founder of CS Real Simple | Building, Transforming and Scaling Customer Success

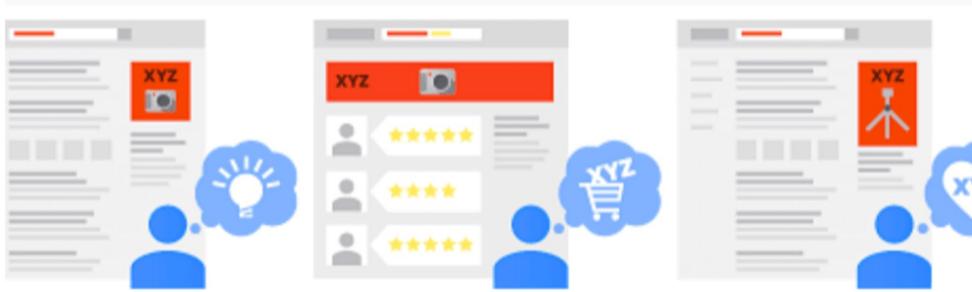
Talks about #cs, #saas, #leadership, #customersuccess, and #customerexperience

New York City Metropolitan Area · [Contact info](#)

22,407 followers · 500+ connections

14 mutual connections: JD Nyland, Jackie Golden, and 12 others

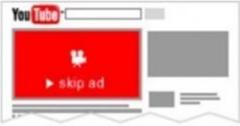
Display Ads



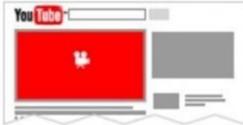
- Google Display Network
- Facebook Audience Network
- mMedia
- Apple Advertising
- Adknowledge
- Yahoo! Network / Oath
- Taboola
- Epom
- Airpush
- Leadbolt

Online Video Ads

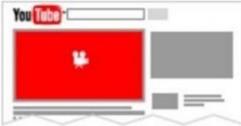
Skippable video ads



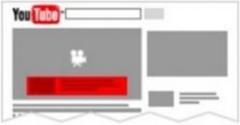
Non-skippable video ads



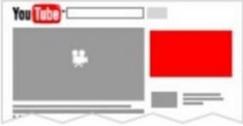
Bumper ads



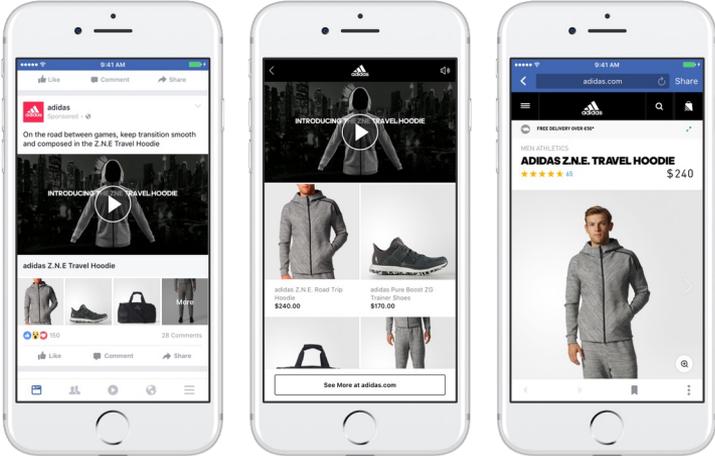
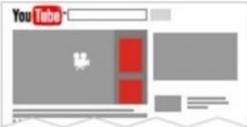
Overlay ads



Display ads



Sponsored cards



TV Ads

Campaign Setup

- Audience
- Budget & Goal
- Video Creative**
- Extension Creative
- Review & Launch

Video Creative



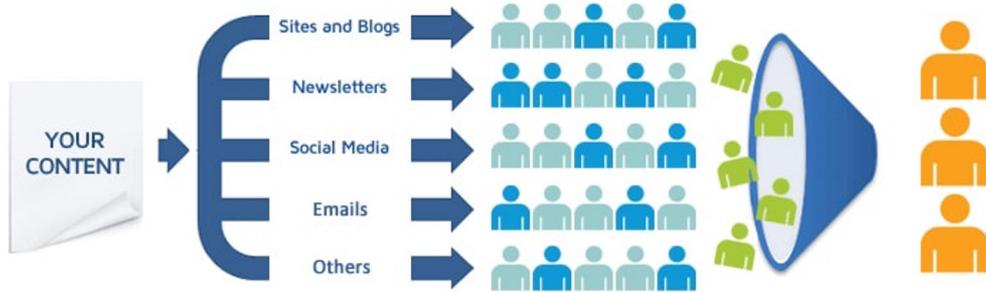
Visit URL

Your Ad Tracking

Done



Content Syndication & Pay-per-Lead Programs



- Demand Science
- CBS Interactive
- eMedia
- SmartBrief
- Software Advice
- Meltwater Reach
- Net Media Reps
- Watershed Publishing
- Madison Logic
- Tech Target
- Marchex
- Tech Media Network

Pay-per-Appointment Programs

Benefits of pay-per-appointment

- COST-EFFECTIVE**
- TARGETED LEADS**
- INCREASED ROI**
- BETTER CONVERSION TRACKING**
- LOW RISK**

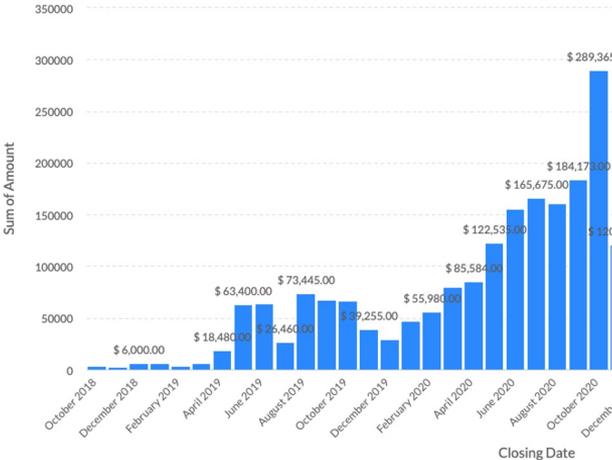
callbox
LIFE MANAGEMENT SOLUTIONS
+65 3159 1112
sales@callbox.com.sg

- ViB
- Cience
- Callbox
- DoGood
- Quartz Media
- BWG
- Rela8 Group
- Intensify
- DemandDog

Partners and Affiliates



Net New Revenue



Small Business Partners

Biz Plan
Legal Services
Logo
Website/Hosting
POS
Merchant Processing
Acct/Payroll
CRM
Doc Storage
Office Supplies
Marketing Services
FB Page
Social Soft
Dunns #
Biz/Per Cred Mont
Tech Systems

Events & Trade Shows



EXPERIENTIAL
MARKETING
SUMMIT

spinGO®



LeadsCon

workfront™

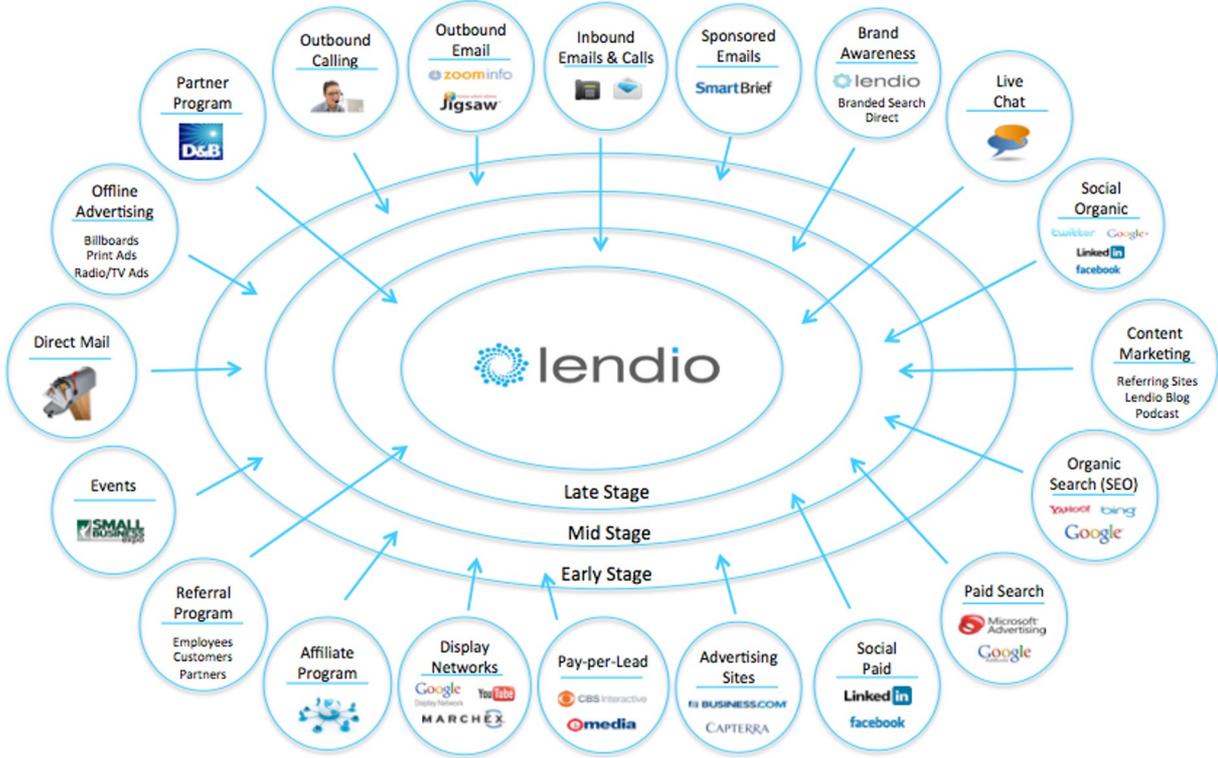
CHOICE
HOTELS®



Other Ways to Generate Leads

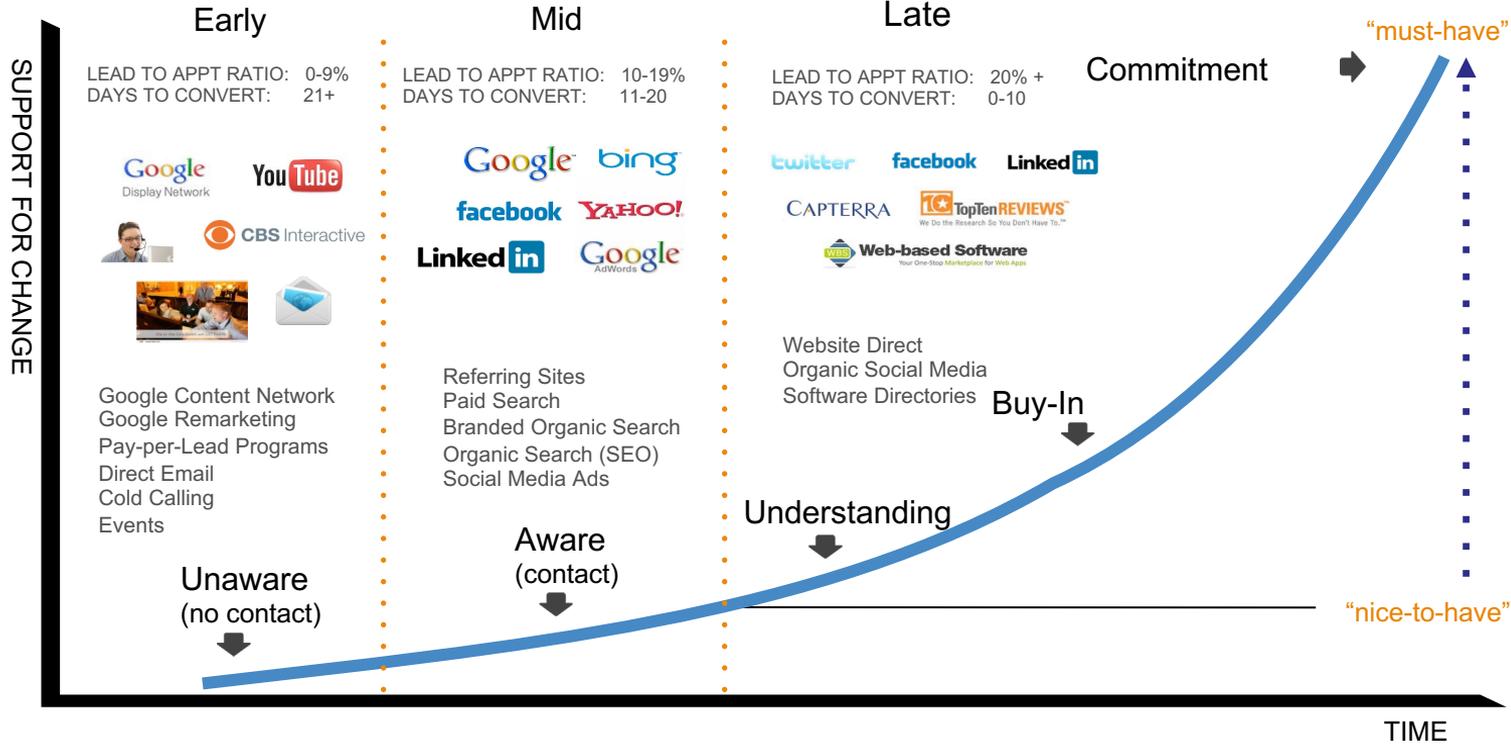
- Podcasts
- Influencer Marketing
- Online Forums, Groups, etc.
- Referral Programs
- Guest Blog Posts
- Sponsored Emails
- Billboards & Outdoor Advertising
- Radio
- Direct Mail
- Communities
- Customer Reviews
- Door-to-door Sales
- SMS & Mobile Marketing
- GEO-based Ads
- Interactive Tools (calculators)
- In-product Marketing
- Upsells / cross-sells
- Chat communities
- Coworking Spaces
- Newsletter Ads
- Microsites
- Virtual Events
- Social Hijacking
- Local SEO
- Push Notifications

Create a Diversified Lead Gen Portfolio



Optimize the Funnel

Not All Leads are Created Equally



Optimize the Funnel



Engagement Rate

Conversion Rate

Marketing Qualification Rate

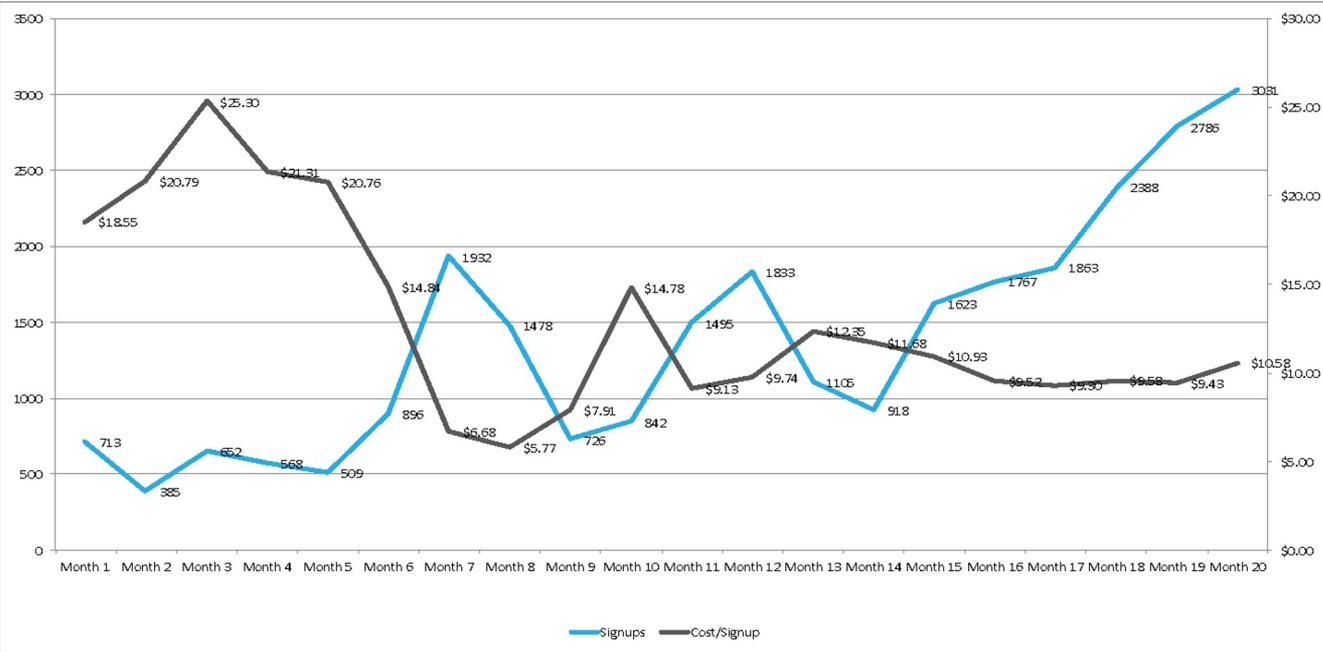
SDR Conversion Rate

Sales Qualification Rate

Sales Close Rate

Retention Rate

Build. Measure. Learn.



Keep a Test Log

A	B	C	D	E	F	G	H
Problem / Opportunity	Baseline	Hypothesis / Solution	Date Started	Date Ended	Results	Learnings	
Improve CTR on Ads	0.30%	Run new ad copy	7/1/23	7/12/23	0.78%	New Ad copy performed better	

A/B Test Planning & Status ☆

Main Table ▾

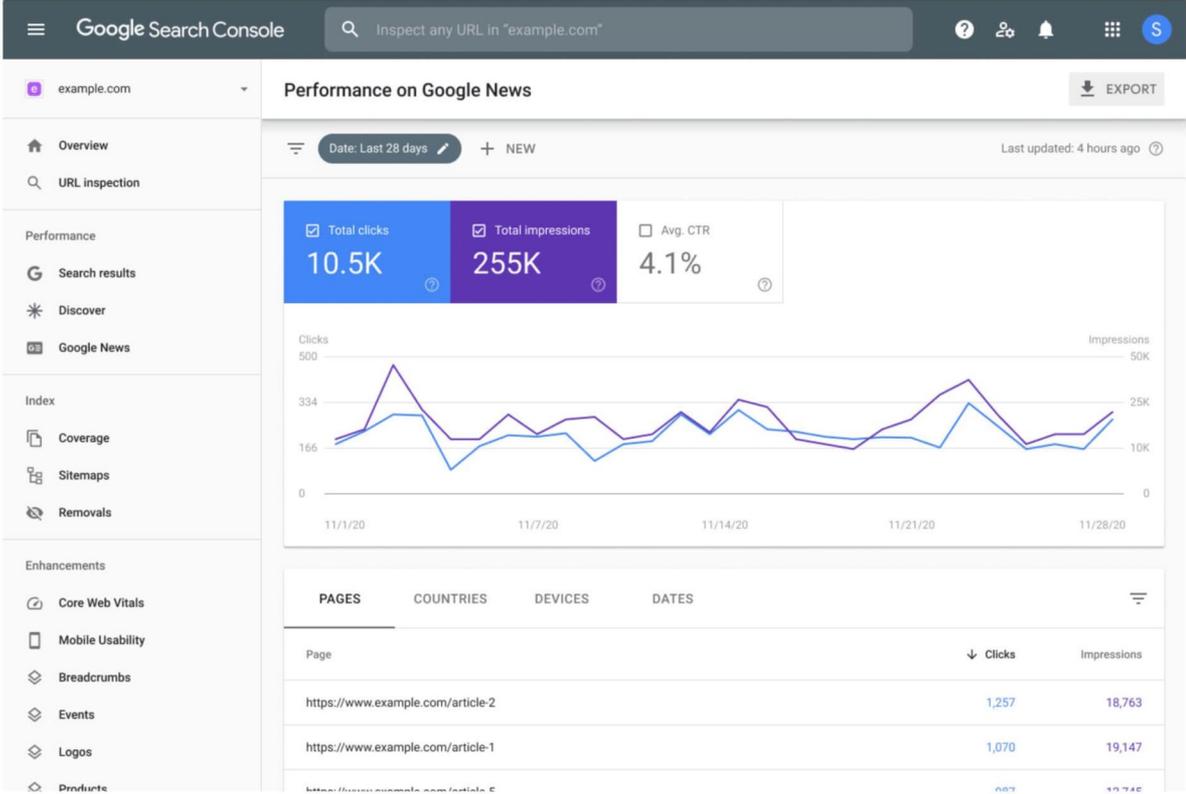
Planned Tests

	Owner	Hypothesis	Status	Channel	Split by
Hi there! Click here to read about ...			New		
Change CTA to purple with white text		If we have a bouncy CTA, visitors will be more ...	New	Adwords	
Red VS Blue color		If we have a bouncy CTA, visitors will be more ...	Research	LinkedIn	Job title
+ Add					

Running Tests

	Owner	Hypothesis	Status	Channel	Split by
People VS product image		If we use assets with real people, visitors are ...	Running	Facebook	Industry
about the company VS value proposi...		If we use a more engaging headline, visitors ar...	Analysis	Instagram	Random
+ Add					

Measuring SEO



Keyword Rank

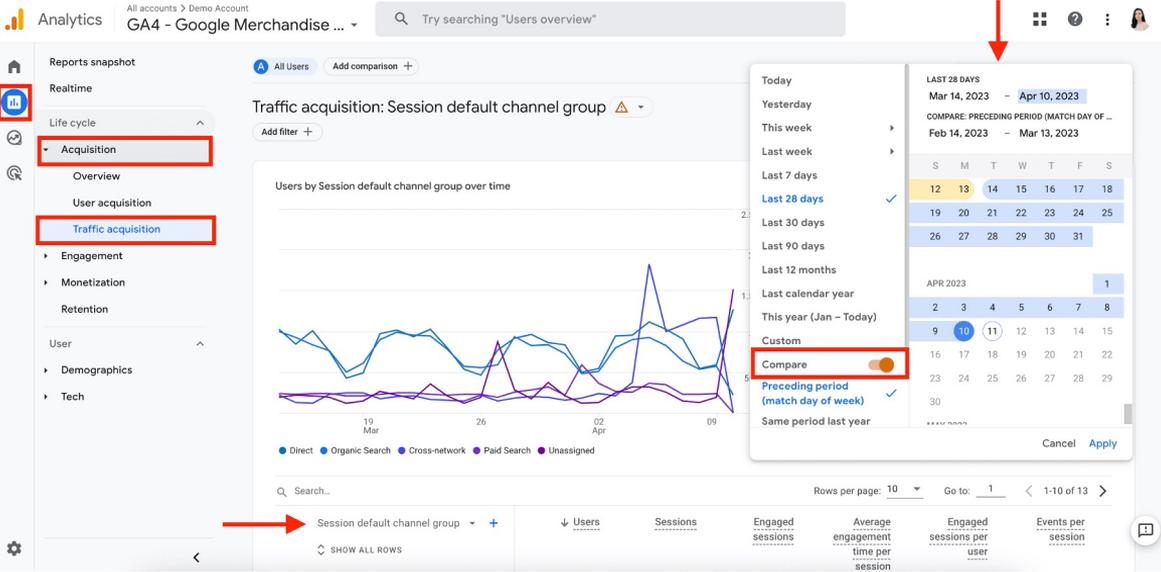
Page Rank

Total Impressions

Total Clicks

Click Through Rate (CTR)

Google Analytics



Website Visits

Landing Page Visits

Goal Completion

Events

Conversion Rate

Measuring Google & Bing Ads

● Campaign	Leads (SF)	Lead: Qualified	Opportunity: Needs Audit	Opportunity: Closed Contract Pending	Opportunity: Closed Won	Closed Won Revenue	Cost / Opportunity
●  TVfA Remarketing - Low Funnel	129.00	15.00	1.00	1.00	0.00	\$0.00	\$3,804.10
●  Branded	836.10	269.80	209.60	112.00	79.50	\$156,550.00	\$2,607.66
●  Mid Funnel Keywords	1,223.20	244.00	184.50	100.00	57.00	\$115,900.00	\$18,666.01
●  Display Remarketing - Low Funnel	82.00	11.00	8.00	2.00	5.00	\$15,000.00	\$4,260.97
●  CORE - National - Broad	480.30	94.00	49.50	25.00	26.50	\$58,450.00	\$3,168.16
●   Branded Branded - Target IS	25.40	16.90	0.00	4.00	4.00	\$20,350.00	\$421.50
●  TOP - Platform - Keywords Test	4.00	1.00	0.00	0.00	0.00	\$0.00	\$1,754.97

What is Offline Conversion Tracking?



1 Ad click

Someone clicks and arrives on your site, browses and reads about your products and services.



2 Webform

Someone fills in a form on your site that becomes a lead for your business.



3 CRM

The lead information is passed on to your CRM, email marketing app or database.



4 Google Ads

When a lead converts, Zapier uploads the conversion information to Google Ads.

or phone call



Call Tracking Metrics

Filter	Search	224,615 calls	Stop Auto Load	Desk Mode	Phone
Contact	Source	Audio	Metrics	Routing	
Sara Dougherty (817) 444-5555 Account ID 000010	Personal (443) 555-1212 (PB Direct)		In progress ⏱ 02:27 📅 Thu Aug 13th 🕒 04:31 PM 🔄 In Progress	Mckenzie Mora Salesforce: Outbound Calls >	
Bobby Churchill (817) 226-4444 repeat caller Company 123 Agency Account ID 000123	Website Tech Support Chat		⏱ 05:13 📅 Thu Aug 13th 🕒 04:28 PM 🔄 In Progress	Laila Gough ZD >	
Ellis Thompson (214) 599-3333 repeat caller	Website Tech Support Chat		⏱ 08:37 📅 Thu Aug 13th 🕒 04:25 PM 🔄 In Progress	Geoffrey Horne (410) 555-2345 ZD >	
Sophia-Rose Neal (919) 555-7890 repeat caller priority customer Company ACME Industries AE/CSM Eve Bryant Account ID 000222 Agency ID 0002 Priority Contact ✓	Website Tech Support Chat		⏱ 42:34 📅 Thu Aug 13th 🕒 03:47 PM 🔄 In Progress	+ set agent Primary Router >	
Josh Bernard (955) 555-2121 repeat caller call missed during meeting voicemail left during meeting Company ABC Treatment Account ID 000145 Agency ID 0007	Google My Business (888) 555-9898 (Google My Business)	audio ⏱ 00:55	📅 Thu Aug 13th 🕒 04:26 PM 🔄 No Answer	Keith Aguilar (443) 555-2222 ZD >	
Michael Decker (214) 555-4646 new caller voicemail	Website (410) 555-0909 (Amy Blair direct)	audio ⏱ 00:38	📅 Thu Aug 13th 🕒 04:24 PM 🔄 No Answer	Amy Blair (410) 555-1515 Amy Blair Amy Blair >	

With Call Tracking Metrics you can track the UTM values associated with a phone call and bring them into your CRM.

You can also report back offline conversions.

Improving Click Through Rate on Search

Sponsored



Wrike

<https://try.wrike.com> › wrike › manage-projects

Wrike Project Manager - Create Project Plans Quickly

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Starting at \$9.80/user per month Suits Teams of All Sizes



Wrike

<https://www.wrike.com> › faq › what-are-project-mana...

Top 21 Project Management Tools: 2023 Guide

ClickUp is a well-known **project management software** solution that works well for most sized teams, including those operating in remote environments. It has all ...

✓ Select campaign settings ✓ Create ad groups 1 Create ads 1 Review ad groups

Edit

Create ad
Write your text ad below. Remember to be clear and specific. [Learn how to write a great text ad](#)

Final URL [?]
URL for webpage your ad will link to

Ad contents [?]
Headline
Description
Description (continued)
Display URL, ex: [www.example.com/books](#)

Device preference [?]
 Mobile

Side ad preview
Headline
[www.example.com/books](#)
Description
Description (continued)

Top and bottom ad previews
Headline
[www.example.com/books](#)
Description
Description (continued)

Sample ads
New York Budget Hotel
[www.example.com](#)
Clean and close to subway.
Students save 20%!

8 Megapixel Cameras
[www.asample.com](#)
20% off Digital Cameras.
Free Delivery. Buy Today!

1 of 5 < >

Page Title
Click on tags below to insert variables into your title.
+ Page Title + Separator + Site Title [View all tags...](#)

0 out of 60 max recommended characters.

Meta Description
Click on tags below to insert variables into your meta description.
+ Page Content + Separator [View all tags...](#)

Need some great ideas for creating blog content that converts? Check out our prompts for writing effective blog posts. They're suitable for any niche.

150 out of 160 max recommended characters.

Measuring Social Media Ads

CAMPAIGN MANAGER | FixDex | Marketing CXO Account

CAMPAIGN PERFORMANCE | WEBSITE DEMOGRAPHICS | ACCOUNT ASSETS | [Create campaign](#)

Account: Marketing CXO Account X | Campaign groups: 10 total campaign groups | Campaigns: 50 total campaigns | Ads: 200 total ads

View: Performance | Breakdown | Time Range: 03/07/17 - 03/14/17 | [Export](#)

[Create campaign](#)

Campaign Name	Status	Spent	Impressions
50 campaigns	—	\$57,735.29	1,392,000
FixDex CXO ADS Campaign ID: 9532102 - Sponsored Content	Active	\$4,169.34	23,130
FixDex CXO High Tech NAMER ADS Campaign ID: 9532102 - Sponsored Content	Draft	—	—
FixDex Life Sciences NAME ...ign ID: 9532102 - Sponsored Content	Active	\$300.00	122,123
FixDex CXO ADS Campaign CID: 45360423 - Sponsored Content	Active	\$150.50	2,000
FixDex CXO ADS Campaign ID: 9532102 - Sponsored Content	Active	\$210.00	4,210

Search Facebook | Cathryn | Home 2 | [Create Ad](#) | [Share Feedback](#) | [Help](#)

Account: Cathryn's Ad Account

Campaign: Bay Area Page Likes - Test 2

Filters | Last 30 days

Performance | Audience | Placement

189 Results: Page Likes

7,376 People Reached

\$100.00 Amount Spent

Custom

May 17 | May 24 | May 31 | Jun 7 | Jun 14

Results: Page Likes (blue line) | Cost per Result (yellow line)

\$0.53 Cost per Result

1.62% Result Rate

Campaign On | [Edit](#)

Delivery ● Not Delivering (Ad Set Completed)

Objective Page Likes

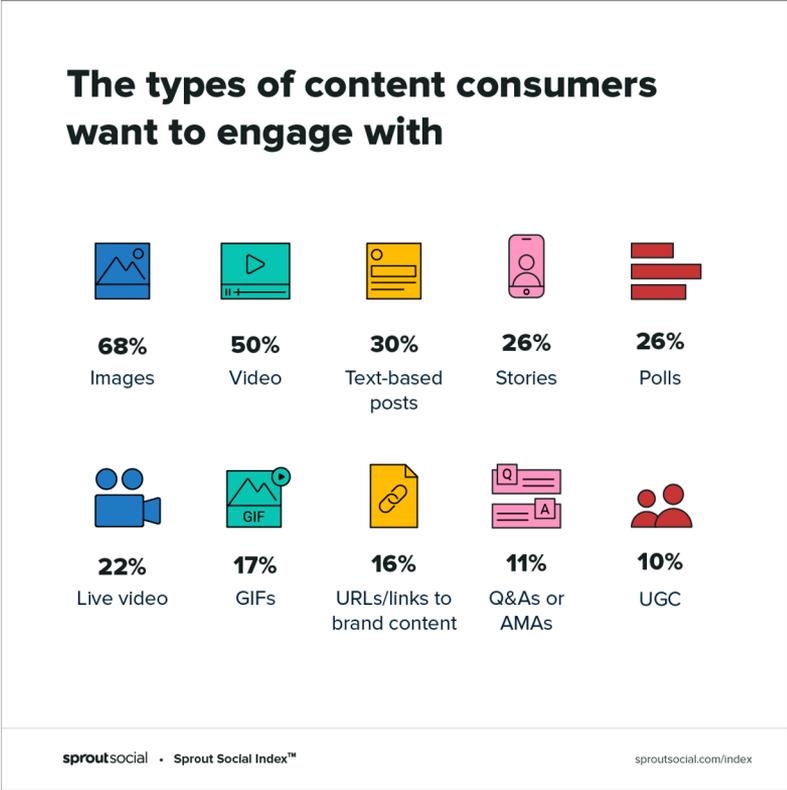
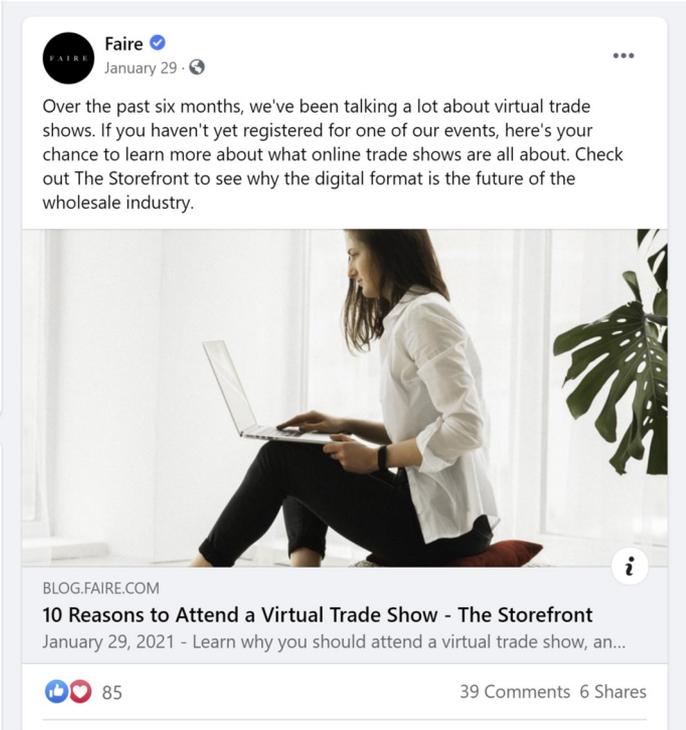
Amount Spent Today \$0.00 spent today
\$502.18 total spent of \$502.18 budget

Total Schedule Mar 04, 2015 8:49pm - Jun 05, 2015 5:43pm

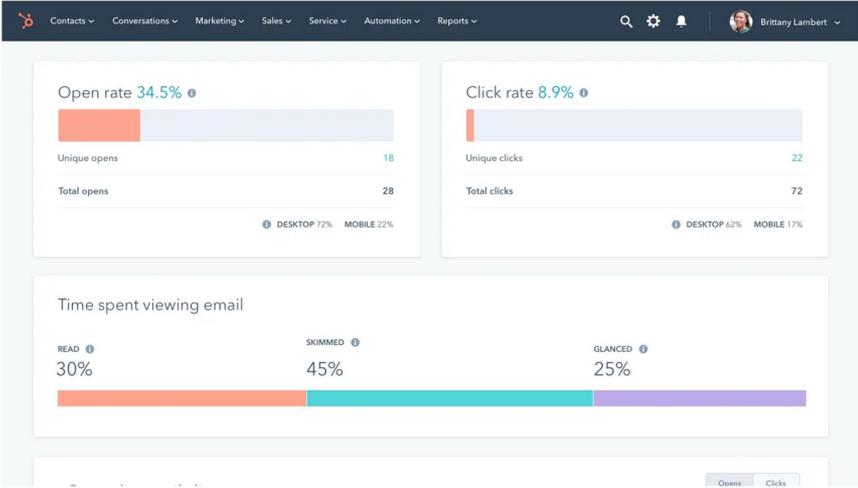
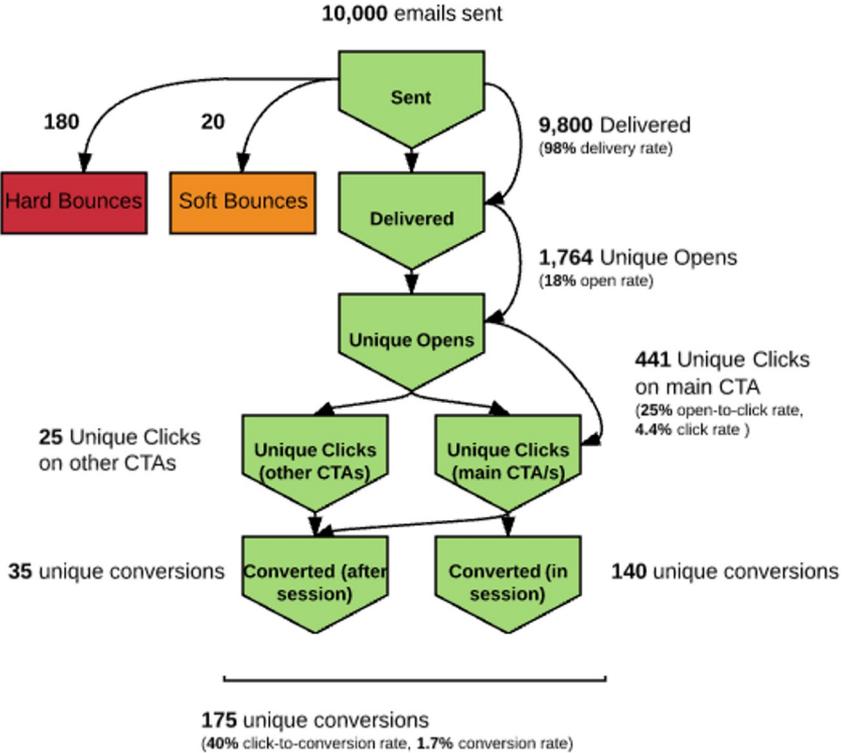
Ad Sets in this Campaign | [+ Ad Set](#) | Columns: Performance | [Export](#)

Ad Set Name	Delivery	Results	Reach	Cost	Budget	Amount Spent	Schedule
<input type="checkbox"/> <input checked="" type="checkbox"/> Bay Area Target Demo 1 - Page Likes Bay Area Page Likes - Test 2	● Completed	189 Page Likes	7,376	\$0.53 Per Page Like	\$200.00 Lifetime	\$100.00	Mar 4, 2015 - Jun 5, 2015 92 days
Showing 1 Ad Set		189 Page Likes	7,376	\$0.53 Cost Per Page ...		\$100.00	

Increase Engagement on Social Media



Measuring Email Marketing



Measuring Booth Effectiveness

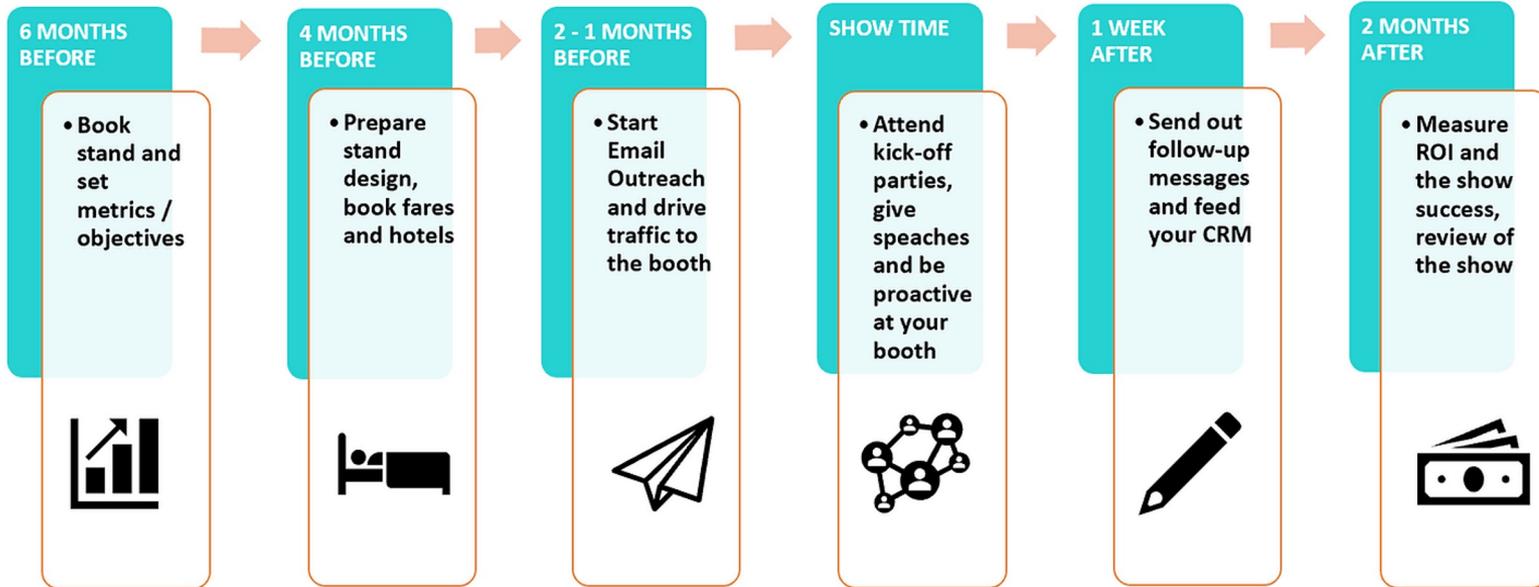


Measure Foot Traffic

Capture Leads



Trade Show Timeline



Conversion Rate Optimization (CRO)

Old Landing Page



Conversion: 0.2%



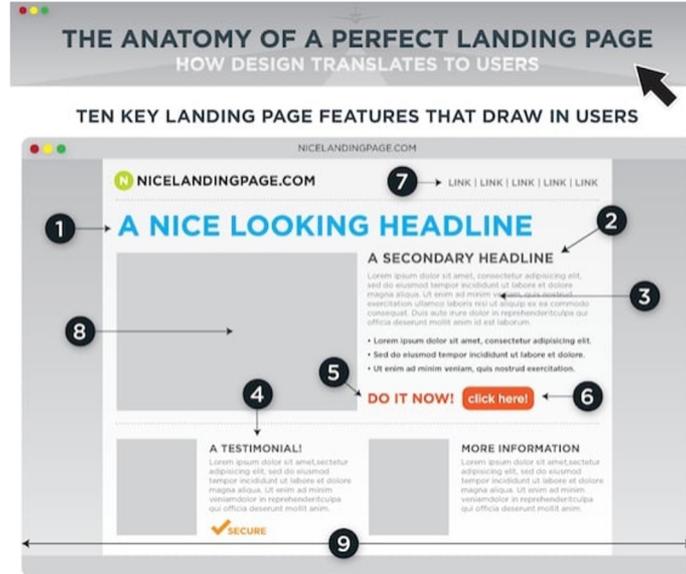
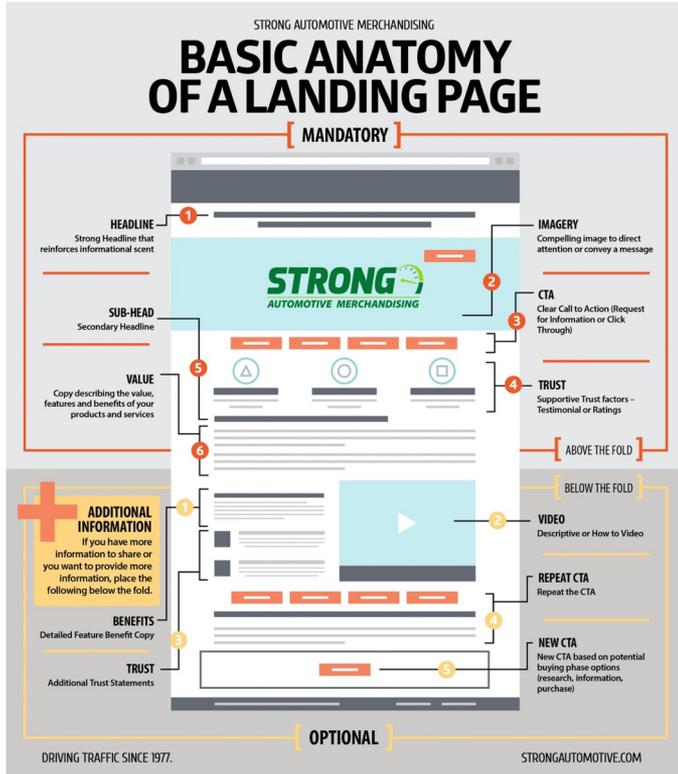
Optimized Landing Page



Conversion: 1.2%

1. Improve your page load speed.
2. Focus on one Call to Action (CTA).
3. Give pages an authentic proof of value.
4. Make your landing page visually interesting.
5. Optimize landing page for mobile.
6. Reduce text on your landing page.
7. Ensure you're speaking to your target audience.
8. Test. Test. Test.

Anatomy of a Landing Page



Empower Your Sales Team

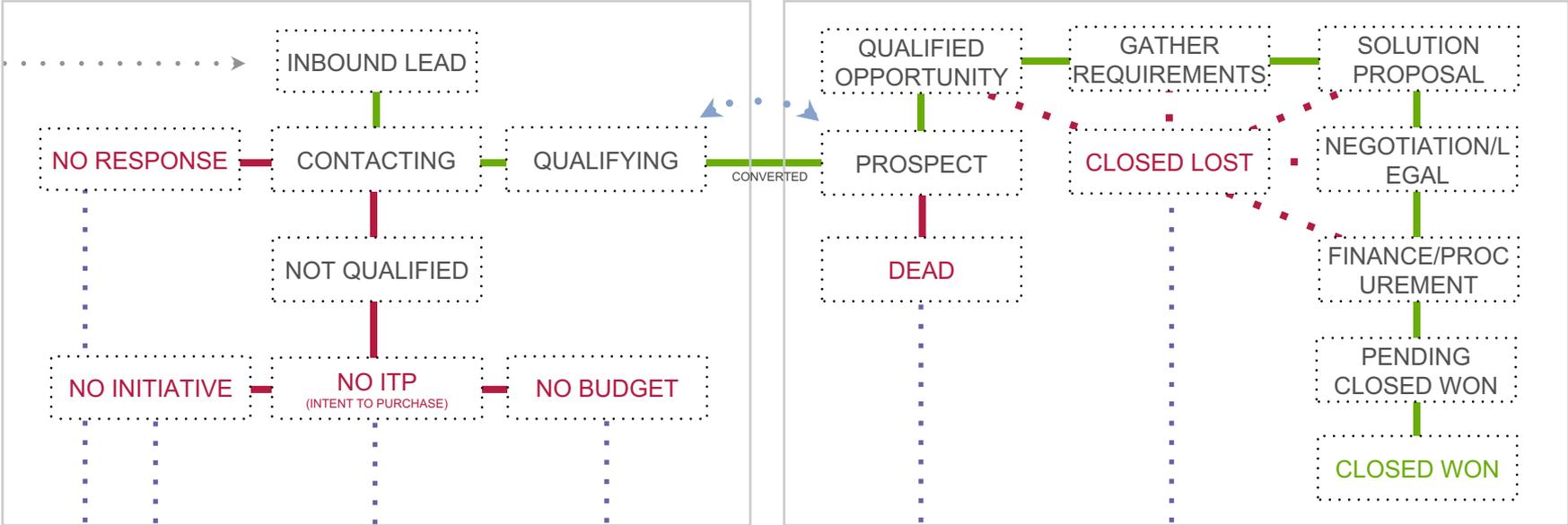
Sales Cycle Diagram



SALES DEVELOPMENT REP (SDR)



ACCOUNT EXECUTIVE (AE)



Post-Lead Nurturing Program ELOQUA

Develop Resources to Help the Sales Team

Sales Proposal



Proposal for: Example Company
Prepared by: Salesperson Name
Date: October 31, 2014

Overview

Digity is an IT advisory and technology support firm serving small businesses across North America. Our goal is to change the way small business owners think about, consume, and maximize technology.

At Digity, our number one concern is you. We understand the unique needs of a small business owner and recognize how important it is for your technology to work correctly. We'll work with you to create a program that makes sense for your business and your budget.

Proposal

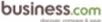
Our proposal is to become your technology partner by protecting your data, providing technical support, and acting as your personal Technology Advisor. Our goal is to provide you with an experience you want to tell your friends about.

Protect Your Data

What you get:	How it works:	Why we do it:
Initial Workstation Setup	We'll optimize your workstation for peak performance. A Digity engineer will install business-grade security protection, exclusions, monitoring and cloud-back-up solution (starting with 1 GB of data).	75% of companies are not adequately protected from computer viruses and more than 50% of small businesses mismanage their backups. SupportSoft.com and JSP Software Survey.
Cloud-based Data Backup	Digity Backup, powered by Mozy, will automatically back up all of your critical files to the cloud. Your data is safe, secure, and available when needed.	Every week, 54,000 hard drives crash in the United States. Google, Future Trends in a Large Data Drive Population, February 2012.
Virus Protection and Removal	Trend Micro Titanium Advanced will identify and eliminate possible threats to your computer and network.	66% of small businesses have been victims of a cyber attack (computer viruses, malware, banking Trojans, etc.). vISA.com Technology Survey.
Managed Workplace	Level Platforms allows us to monitor the health, availability, and performance of your technology infrastructure.	The cost of losing just 15 minutes per day from a slow computer ends up costing an average of \$150 per year, per employee. Assume 1 job for 30% workforce.

www.digity.com | 807.907.4022 | 2400 Ashton Blvd Suite 260 Lehi, UT 84043

Sales Collateral

Sales Collateral - Business.com

Overview

Digity is an IT advisory and technology support firm serving small businesses across North America. Our goal is to change the way small business owners think about, consume, and maximize technology.

Digity Technical Assessment

Answer the following questions for a comprehensive look at the health of your business technology.

Question	Options	Points	Category
1. How often do you run a full scan of your antivirus software?	Every night, Every month, Once a week, Once a month, Every few months, When I remember, No dedicated software	10 points, 8 points, 6 points, 4 points, 2 points, 0 points	Protection
2. How often do you backup your data?	Once daily, Once a week, Once a month, When I remember, Never	10 points, 8 points, 6 points, 4 points, 0 points	Protection
3. In your opinion, on a scale from 1 to 5, how secure is your business from cyber attack?	1-5	10 points, 8 points, 6 points, 4 points, 2 points	Protection
4. When was the last time you checked for updates for your operating system, internet browser, and software programs?	1-5	10 points, 8 points, 6 points, 4 points, 2 points	Support
5. When was the last time you performed maintenance on your computers (including removing old or unused programs, optimizing your start-up process, cleaning out temporary files, and defragmenting your hard drive)?	1-5	10 points, 8 points, 6 points, 4 points, 2 points	Support
6. How long does it take for you to set up a new employee with all their technology needs?	One hour or less, 2-8 hours, Full work day, 1-2 work days, 3+ work days	10 points, 8 points, 6 points, 4 points, 2 points	Advice
7. On a scale from 1 to 5, how would you rate your personal knowledge of technology?	1-5	10 points, 8 points, 6 points, 4 points, 2 points	Advice
8. On a scale from 1 to 5, how up to date is your company with industry-specific technologies and programs?	1-5	10 points, 8 points, 6 points, 4 points, 2 points	Advice
9. If you experienced a major data loss today, how long would it take to recover crucial information?	Less than 1 hour, 2-8 hours, Full work day, 2-3 days, Don't know	10 points, 8 points, 6 points, 4 points, 2 points	Advice
10. On a scale from 1 to 5, how would you rate your relationship with the person who currently handles your tech support?	1-5	10 points, 8 points, 6 points, 4 points, 2 points	Advice

TOTAL POINTS: 0

www.digity.com | 807.907.4022 | 2400 Ashton Blvd Suite 260 Lehi, UT 84043

Sales Presentation

ABOUT DIGITY



2004
 Established
U.S. Based
 Lehi, UT
1200+
 Businesses across the country trust Digity.

PUT DIGITY TO WORK

Digity is an IT advisory and technology support firm serving small businesses across North America. We strive to change the way small business owners think about, consume, and maximize technology.

Protect Your Data



Support Your Network



Stay Ahead of the Technology Curve



TECHNOLOGY ROAD MAP



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The Challenger Sales Pitch Deck

~~Traditional Deck~~

- Company
- Features
- ROI
- Comparison
- Social Proof

Challenger Deck

- Polarizing Insight
- Problem Slide
- Story Slide
- Value Proposition
- Best Evidence

Source: "The Best Sales Deck Ever" by



Content for Nurturing



CUSTOMER SUCCESS LEADERSHIP WEBINAR SERIES
April 14 - April 30, 2020

Andrew Marks, Donna Weber, Kristen Hayer, Michael Harnum, Patrick Campbell, Julie Hogan

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clientsuccess

MURAL creates a comprehensive customer lifecycle management program and saves days of work each week with ClientSuccess.

The Challenge

The Client Success team at MURAL, known as CSMs, was made up of 11 Head of Customer Success, 7 Sales and 40 Support Agents. CSMs were responsible for managing the customer lifecycle and ensuring that customers were successful in using MURAL's software. The challenge was to create a comprehensive customer lifecycle management program that would save time and reduce the risk of customer churn.

Successes with Client Success:

- The user interface is highly intuitive and easy to use.
- Support agents are able to resolve issues quickly and efficiently.
- Customers are highly satisfied with the product and the support they receive.
- The team has successfully implemented a comprehensive customer lifecycle management program.

Case Studies



clientsuccess

5 Essential Skills CSMS Need to Succeed

5 ESSENTIAL SKILLS CSMS NEED TO SUCCEED

1. Listening & Understanding

2. Problem Solving & Resolution

3. Communication & Collaboration

4. Time Management & Organization

5. Customer Empathy & Relationship Building

Blog Posts



2021 THE STATE OF CUSTOMER SUCCESS

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Industry Reports



FREE CUSTOMER SUCCESS BOOTCAMP REDUCING CHURN

Star Hofer, Scott Sambucci, Kristi Faltorusso, Kate Neal

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Bootcamps



Events

Gain Insights from Your CRM

Process Builder - Lead Assignment Rules

```

    graph TD
      Start([START]) --> Lead{Lead}
      Lead -- TRUE --> Assign[Assign to Sales Rep]
      Lead -- FALSE --> Stop1([STOP])
      Stop1 --> Stop2([STOP])
      Stop2 --> Confirmed{Confirmed}
      Confirmed -- TRUE --> Stop3([STOP])
      Confirmed -- FALSE --> Stop1
    
```

Q2 2011 Campaign Funnel

- Impressions: 83,161,600
- Clicks: 142,384
- Leads: 14,161
- Opportunities: 1,168
- Closed Won: 95

Opp Value YTD by Tactic

Marketing Tactic	Value
Partners/Affiliates	3,611,149.04
Search	1,050,245.96
Direct Mail	883,676.86
Referrals	1,187,830.42
Events	1,296,254.74
Other	1,461,837.56
Advertising	1,296,254.74
Social Media	1,461,837.56

Dashboard - Marketing - Month-to-Month

Leads by Day of Month

Opps by Day of Month

Leads by Month

Opps Created by Month

Deal Insights

- NEW LEADS TODAY: 102 (+103.3%)
- MONTHLY LEAD COUNT: 2185 (-16.0%)
- DEALS IN AGREEMENT SENT: 101
- DEALS WON THIS MONTH: 470 (+2.8%)
- REVENUE THIS MONTH: \$43,555.00 (-48.6%)
- DEALS BY STAGES: Bar chart showing counts per stage
- OPEN AMOUNT BY USERS: List of sales reps and their open deal amounts
- REVENUE BY USERS: List of sales reps and their revenue

SendFromContact

```

    void SendFrom_Contact(String contact_email,String contact_phone,int uid,...)
    {
        1. myMap = Map();
        2. myMap.put("email",contact_email);
        3. myMap.put("phone",contact_phone);
        4. myMap.put("message",contact_message);
        5. myMap.put("contact_owner",contact_owner);
        6. update = zoho.crm.updateRecord("Texts",text_id,myMap);
        7. update = zoho.crm.updateRecord("Texts",text_id,myMap);
        8. myMap = Map();
        9. myMap.put("email",contact_email);
        10. myMap.put("phone",contact_phone);
        11. myMap.put("message",text_message);
        12. myMap.put("contact_owner",contact_owner);
        13. if(contact_owner == "John Kemp")
        14. {
        15.     resp = postIn("https://hooks.zapier.com/hooks/catch/221663/77d88a/",myMap);
        }
    }
    
```

Workflow: 1 - Appointment Missed

- Trigger: Appointment Missed
- Condition: Stage IS Appointment Not Held
- Action: Send Email to Contact Owner



Leverage Marketing Automation

The collage illustrates various marketing automation capabilities:

- HubSpot:** Shows an email newsletter titled "Whoever Keeps the Most Customers Wins" featuring Patrick Campbell, CEO of Protivest. It includes a "POST" section with links to resources and a social media integration for Facebook, LinkedIn, and Twitter.
- Eloqua:** Displays a "Contact enrollment trigger" workflow where a "Form submission" leads to a "Send email" action.
- SharpSpring:** Shows a contact profile for "Beginner Ben" with fields for name, email, phone, and social media links. It also features a "Forms" section with a "Form Submissions" bar chart and a "Disruptive" ad campaign.
- Pardot:** Shows a "Smart Campaigns" dashboard with a line graph of campaign performance and a list of campaign statuses (e.g., "00 - Signup - Trial", "01 - Whitelist Evaluation - Trial").
- Marketo:** Shows a dashboard with various marketing activities like "Marketing Activities", "Design Studio", "Database", "Analytics", "Email Insights", "Community", "SEO", and "Marketo Sky".



Strengthen the Team Culture

- Hire Great People
- Have Regular Company Meetings
- Pay for Team Lunches
- Sponsor Group Activities
- Help Build Friendships
- Align Compensation Plans
- Up Level Employees
- Provide Excellent Benefits
- Throw Company Parties
- Recognize Good Work
- Empower Managers (team culture budget)
- Create a Culture Video for Recruiting
- Give out awesome swag



Marketing Sprint Framework

PRIORITIZE the **obstacles**
and **eliminate** them one by one

Create a Backlog of Projects Needed to Reach Your Goals

Priority	Category	Project
1	Lead Gen	Improve conversion rate on website
2	CRM	CRM optimization, automation, workflows
3	Sales	Basic sales training outline and plan
4	Operations	Automation for 1 st Attempt
5	Lead Gen	Relaunch Google Ads
6	Lead Gen	Lead gen forecast and budget allocation
7	SEO	Keyword research for SEO and topical guide
8	Operations	Closed loop marketing
9	Lead Gen	Referral program
10	Operations	Automation for Agreement Sent

- Review your Annual Plan and next quarter's goals and success metrics.
- Brainstorm project ideas that can help you reach those goals. No ideas are bad in a brainstorm.
- Create a list of all ideas.
- Categorize the list by department or team responsible.
- Prioritize the list based on impact to the company.

Leverage the Monthly Sprint Framework to Get Work Done

1 Monthly Strategy Meeting

- Held monthly for 1-2 hours
- Review mission goals and KPIs
- Add new projects to the Backlog
- Prioritize the Project Backlog based on company impact
- Pick 3-4 projects per person to be completed over the next 3 weeks
- Each individual outlines the tasks for their projects
- Be sure to clearly define what "Done" looks like for each project

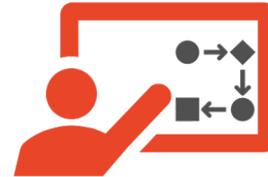
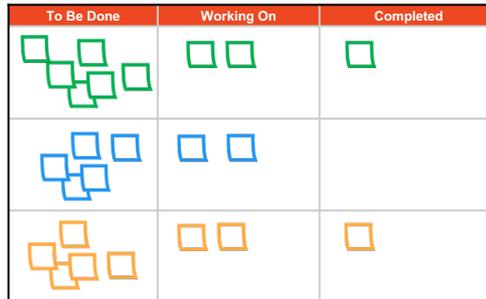
2 Daily Standup Meetings

- Held daily for 10 minutes during the 3-week Sprint
- Keep the meeting short and on topic
- Each person gives an update on their tasks and moves the tasks forward on the Sprint board
- Discuss any roadblocks and communicate needs

3 Sprint Review and Demo Meeting

- Take 1 week "off" each month for catch up work and preparation
- Each team member creates 1 slide that represents "Done" for each of their projects
- The Team Leader combine the slides and schedules a Sprint Demo meeting
- Invite other departments or impacted team members to the meeting. This creates accountability and visibility.
- Each person has 1 minute per slide and presents their completed projects.
- Celebrate the wins!

Priority	Category	Project	Owner
1	Lead Gen	Improve conversion rate on website	Jack
2	CRM	CRM optimization, automation, workflows	Sally
3	Sales	Basic sales training outline and plan	Fred
4	Operations	Automation for 1 st Attempt	Bill
5	Lead Gen	Relaunch Google Ads	Jack
6	Lead Gen	Lead gen forecast and budget allocation	Jack
7	SEO	Keyword research for SEO and topical guide	Sally
8	Operations	Closed loop marketing	Bill
9	Lead Gen	Referral program	Jack
10	Operations	Automation for Agreement Sent	Bill



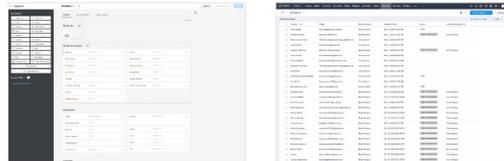
Sprint Review & Strategy Meeting

November 1, 2022
Marketing Update

Agenda

1. Review goals + milestones
2. Review project backlog
3. Decide next steps

Set Up Zoho



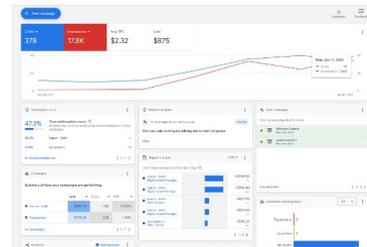
2. Basic Buyer Personas

PERSONA NAME	Gray Barn	Neville Nick	Green Gary	Trist Tom
Role	Agent	Homeowner	Green	Not Green
Sub-Category	Experienced	Less Experienced	Green	Not Green
What differentiates this persona from the others?	Customer-centric	Transaction Focused	High income	Average Income
Demographics	Green	Not green	Male	Male
Demographics	Female	Male	White	White
Demographics	White	Hispanic/Latino	Asian	White
Demographics	English/Spanish	English/Latino	English/Mandarin	English
Demographics	AZ	NY	FL	FL
Demographics	CA	39	45	55
Demographics	51	Financially Strwell	Some financial knowled	
Goals	Increase purchase price	Simplify the transaction		
What do they want that we can facilitate?	Help with any home transaction	Focus on fast turnovers		
Challenges	Clear high quality service	Avoid difficult transactions		
What problems do they have that we can help solve?	Escalating leased payments	score buyers away		
Objections	Believes home owners aren't ready to go green			
What objections do they have with us?	Green homes complicate the sale			
Influencers	Other Agents	Other Agents	Agent	Agent
Who might sway them in their decision?	Associations/Broker	Associations/Broker	Spouse/Partner	Spouse/Partner
	Personal Network	Personal Network	Personal Network	Personal Network

Sales Enablement Battletcard

Battletcard

Google Ads Campaign



Next Up (November/December)

- Prep for January 2023 Launch with Pattern Sales Team
- Fix lead tracking problems on website and in HubSpot. Ensure leads are routed correctly.
- Focus on getting Google working correctly
- Create new eBook from Amplifi blog posts
- Generate leads:
 - Google Ads
 - LinkedIn Ads
 - Capterra
 - Retargeting Ads

Hire a Strong Marketing Leader to Make it All Happen



- 10+ Years in Marketing-Specific Jobs
- 2+ Years in Executive/Leadership Roles
- Bachelor's Degree or Higher
- Industry-Relevant Skills
- Strong Technology Background
- Capable Project Manager
- Excellent Communicator

The Marketing Blueprint for High-Growth Companies



1. Clear Company Vision
2. Brand Identity
3. A Story that Resonates
4. Website with Clear Messaging
5. Product-Market Fit
6. Customer Journey Map
7. Marketing Technology
8. Marketing Success Metrics
9. Campaign Tracking & Reporting
10. Diversified Lead Channels
11. Optimize the Funnel
12. Empower Your Sales Team
13. Marketing Sprint Framework
14. Strong Marketing Leadership

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The \$10M Blueprint
A Masterclass in Growth

THURSDAY, MAY 16, 2024
11:00 AM - 1:00 PM
FREE LUNCH

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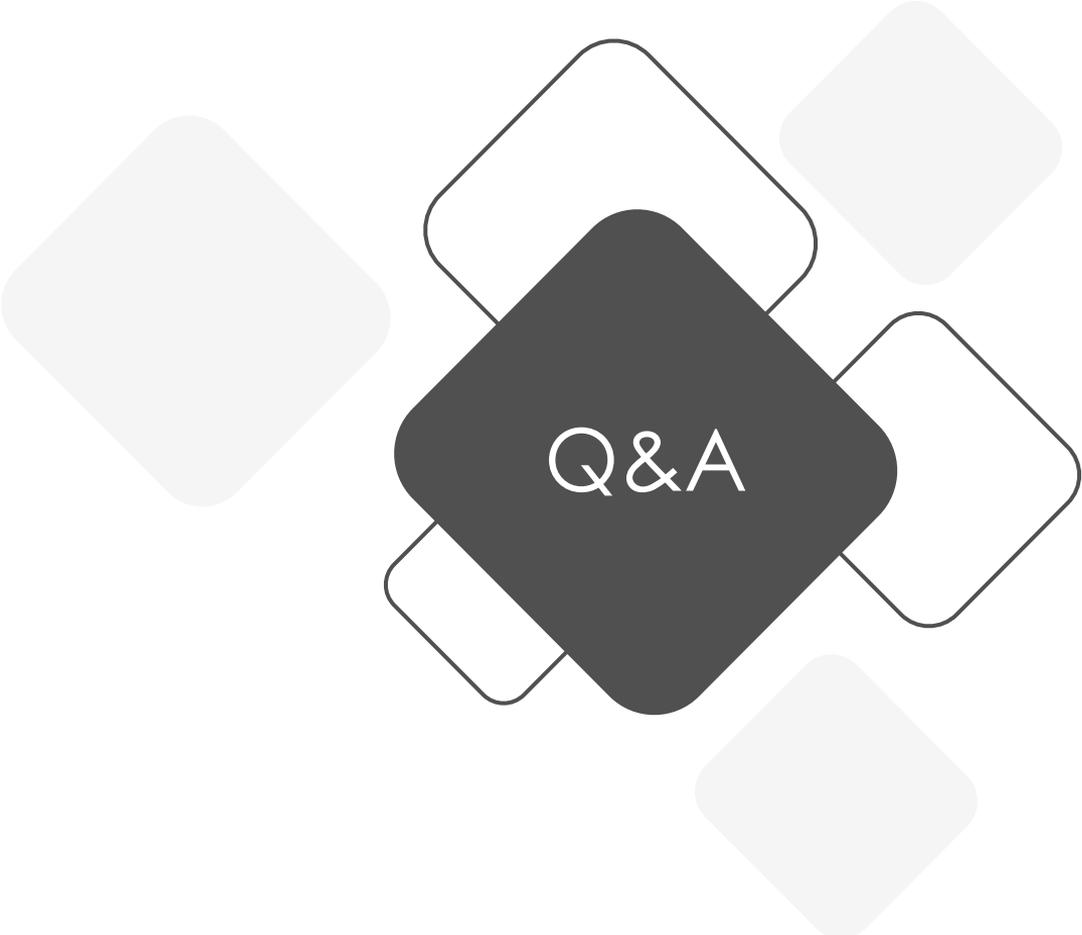
2701 N Thanksgiving Way #100
Lehi, UT 84043

DAVID GILLILAND
ELITE ENTREPRENEURS

JESSIE WARNER
ACHIEVE CMO



<https://achievecmo.com/10m-blueprint/>

A central graphic consisting of a dark grey diamond with rounded corners containing the text 'Q&A' in white. This central diamond is surrounded by four lighter grey diamonds, also with rounded corners, arranged in a cross pattern. The diamonds overlap each other, creating a layered effect.

Q&A