PRECISION ROLL SOLUTIONS
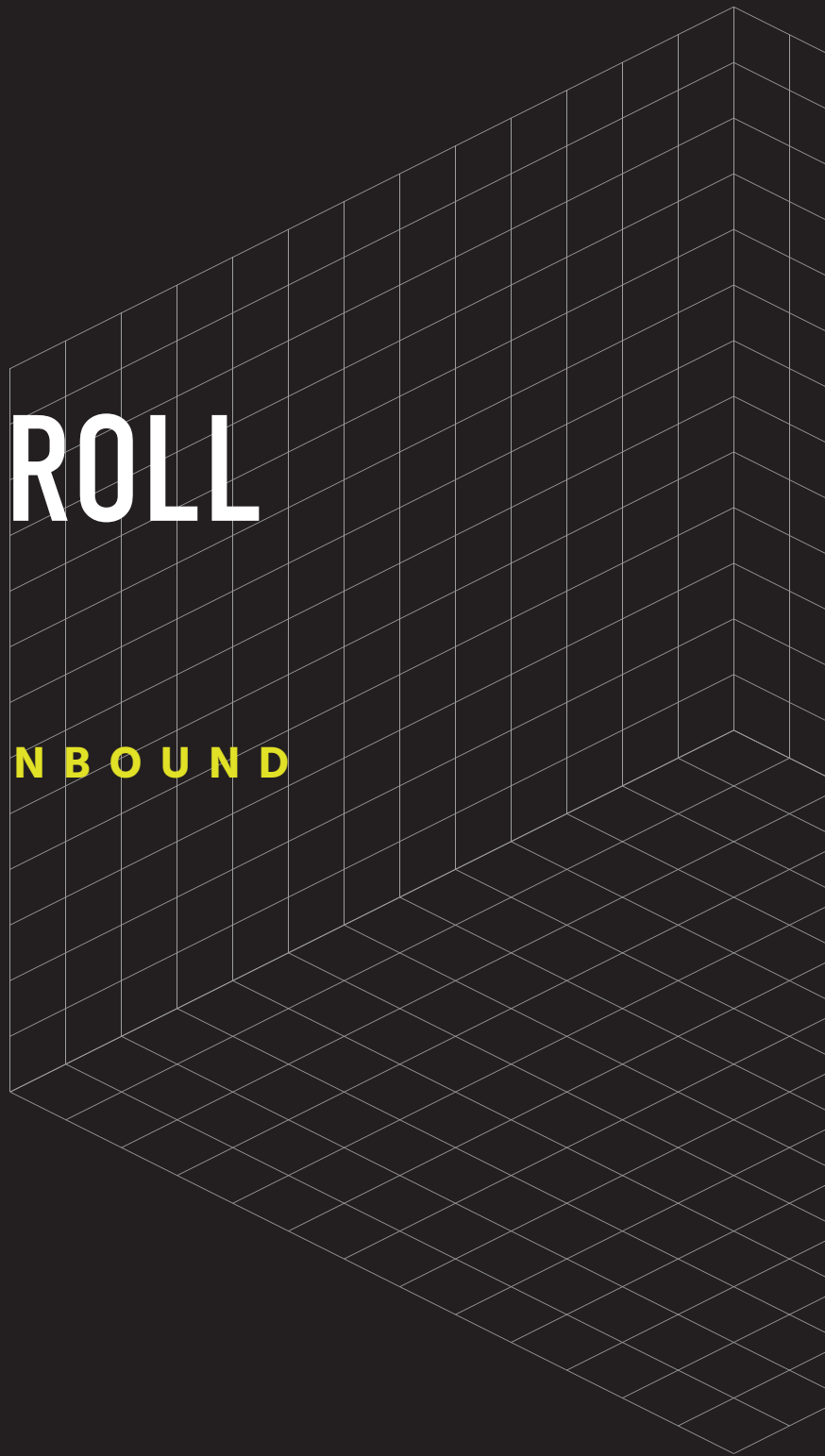
GROWTH WITH INBOUND

WEIDERTGROUP

MARKETING GOAL

It's the shared goal of Precision Roll Solutions (PRS) and Weidert Group to develop an inbound marketing and sales program that produces the quantity and quality of leads needed to support business growth goals and attract talent. In advance of the program launch we need to clarify the understanding around brand direction.

GROWTH WITH INBOUND

1

SET THE INITIAL INBOUND STRATEGY & SET UP

Develop the initial Inbound Marketing Plan & Playbook for the PRS Website, Lead Management Process, and Kickstart Campaign, and set up foundational items.
TIMELINE: July – August

2

SALES PROCESS PROJECT

Work with PRS sales leadership to define and implement an improved and automated process for inbound lead capture, qualifying, nurturing, and handoff to the sales team.
TIMELINE: July – September

3

WEBSITE DEVELOPMENT

Redesign of precisionrollsolutions.com based on the inbound strategy.
TIMELINE: September – December

4

KICKSTART EFFORTS

Create an initial content offer to leverage on the existing website, to help jumpstart some initial lead gen, and to have this ready ahead of the new website.
TIMELINE: September – October (launch in October)

5

INITIATE THE CORE INBOUND PROGRAM / ADD'L PLAN & PLAYBOOK CHAPTERS

Attract, engage, and delight leads and customers for PRS; continuous improvement and optimization.
TIMELINE: Starts December

WEIDERT GROUP'S PROMISE:

To do everything in our power to transform and profitably grow clients' businesses.

ALIGNMENT WITH PRS' INTERNAL INITIATIVES

Based on PRS' internal initiatives for the year, here's a summary of how these initiatives align with the recommendations in our proposal.

1. SET 3-YEAR TARGETS

- Our **Sales Process Project** (pages 17-20) and **Reporting & KPI Strategy** – as part of our Plan & Playbook (page 12) – will help to set realistic targets for year 1 of the program and beyond.
- In addition, we'll be able to help PRS track the progress of these targets with realtime, automated **sales and marketing dashboards** in HubSpot.

2. SET SALES ORG

- Our **Sales Process Project** (pages 17-20) is a three-month project to address mapping of the ideal sales process for PRS, implementing the needed tools and processes, determining how sales automation can be leveraged, training of the team, and then assisting with optimization and reporting of this newly-defined strategy.

3. DEFINE SALES PROCESS

- As noted above for Initiative #2, our **Sales Process Project** (pages 17-20) will include hands-on support from our experienced sales enablement team to help PRS define the ideal sales process for your growing organization.

4&5. SET KPIs / ALIGN COMPENSATION

- As noted above for Initiative #1, our **Sales Process Project** (pages 17-20) and **Reporting & KPI Strategy** – as part of our **Plan & Playbook** (page 12) – will define the main KPIs for both sales and marketing, and include a plan on how we track leading and lagging indicators of program success.
- Defined goals and KPIs with the sales team, and tracking of sales team performance, will be a supporting driver for compensation decisions.

6. ENHANCE SYSTEMS

- As noted on pages 31-33, we have recommended the use of the **HubSpot Tech Stack** to align marketing and sales within an integrated CRM – in addition to a more powerful website content management system (CMS) that is also powered with the same CRM data.
- The HubSpot platform will also provide **powerful, automated reports** that specifically show the attributed revenue from our joint marketing and sales efforts.

7. DEVELOP BRANDING STRATEGY

- Our **Plan & Playbook** (pages 10-12) will address the Mission & Vision for PRS (now and for the future), in addition to the brand's Competitive Advantage, Positioning, and Messaging Framework.
- These exercises and the strategic output within the Plan & Playbook will help to support future acquisitions of small and larger companies, and support how those brands get rolled into the PRS brand.

8. REFRESH COMMUNICATIONS STRATEGY

- As noted in Initiative #7, our **Plan & Playbook** (pages 10-12) includes recommendations for the brand's Competitive Advantage, Positioning, and Messaging Framework.
- In addition, the Plan & Playbook and **Content Kickstart Campaign** (page 15) will address how we begin to leverage email marketing and social media to promote content that attracts and converts new leads.

9. SET DAILY MANAGEMENT (FOR SALES TEAM)

- As noted for Initiative #2, our **Sales Process Project** (pages 17-20) will address mapping of the ideal sales process for PRS, including the daily and weekly routine required for inbound sales success and the dashboards to see and manage the tasks within this new routine.

10. PROBLEM SOLVE/ANALYZE

- Everything we've recommended within our proposal will be trackable to visualize and analyze performance thanks to the integrated **HubSpot Tech Stack**. This will allow for quick identification of problems and opportunities so they can be acted on.
- Marketing activities/campaigns can be tracked in Marketing Hub, Sales leads & activities in Sales Hub, and Website performance/optimization in the Website CMS Hub.

ATTRACT
DELIGHT
CUSTOMERS
ENGAGE

Every stage of the buyer's journey is interconnected, from **stranger** to **prospect**, **customer,** and **promoter**. This means your marketing, sales and service should be, too. The more force you apply and friction you remove, the better the experience for your customers. The following recommendations for attracting, engaging, and delighting (PRS' Flywheel) are the building blocks for your initial "core" monthly inbound program.

MANAGE CUSTOMER RELATIONSHIPS

ATTRACT
- Publish content that answers your buyers' questions with **blog articles**
- Promote your content through **email and social media** channels
- Optimize your website for the user experience/conversion and for being found on search engines with **SEO and paid advertising**

ENGAGE
- Convert leads with gated **content offers** and live chat/chatbots
- Nurture with **marketing automation workflows**
- Qualify leads for sales with **lead scoring**
- Connect with leads quickly with automated **lead notifications and sales sequences**

DELIGHT
- Gather and manage **customer feedback**
- Promote **case studies** and reviews/testimonials
- Segment **customer emails** and **nurturing workflows**
- Deliver exceptional service with **live chat/chatbots**
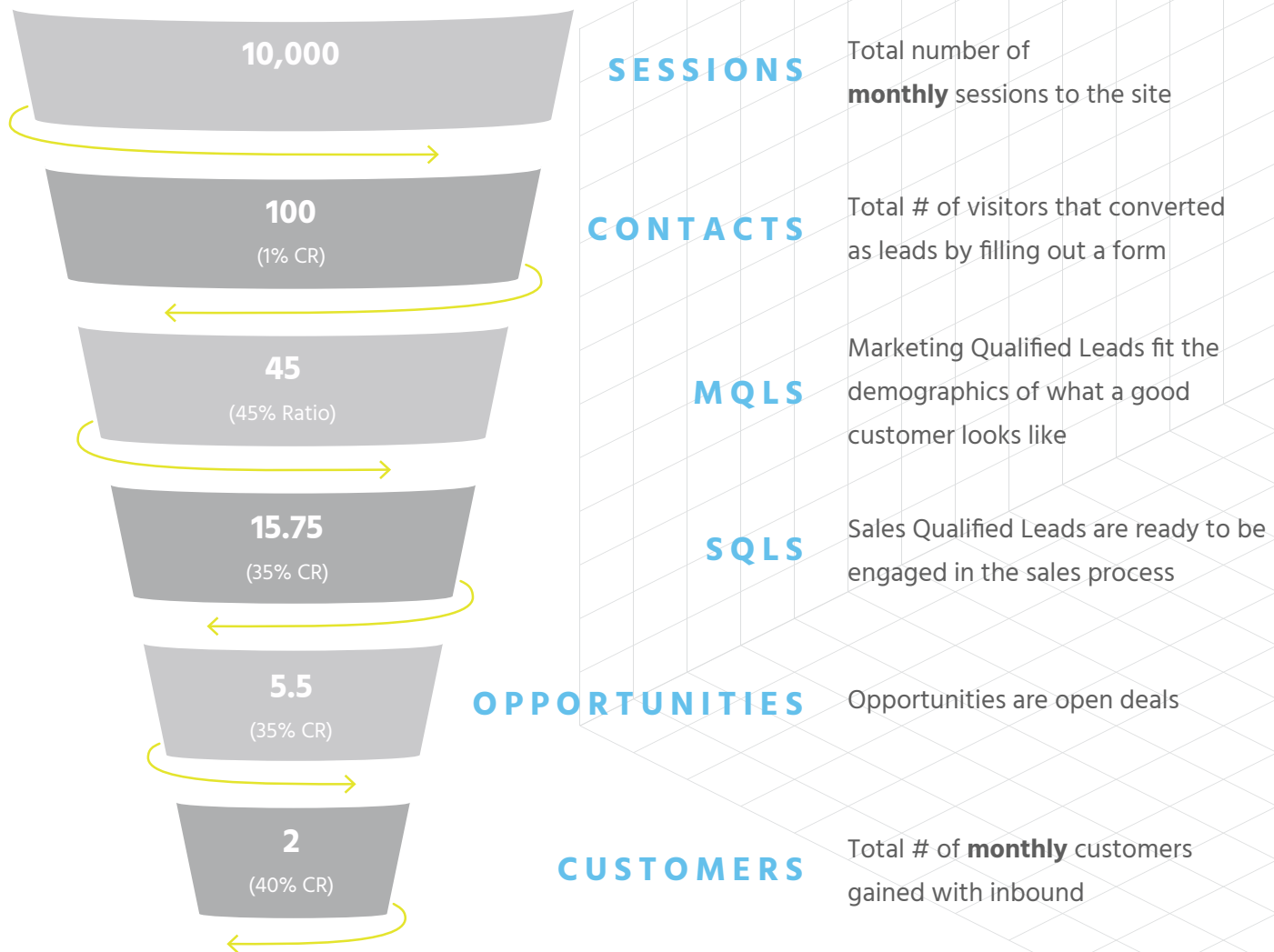- Engage with promoters through **social media monitoring**

TRACK, ANALYZE & ADJUST
- Track and monitor performance, customer acquisition, and ROI with **analytics/reporting dashboards**
- Adjust/optimize program as needed to make it even more powerful with data-driven decisions and **strategic 90-day roadmaps**

Base KPIs we'll measure as we collect data from PRS' inbound marketing program are shown below.

EXAMPLE FUNNEL METRICS

10,000

SESSIONS — Total number of **monthly** sessions to the site

100
(1% CR)

CONTACTS — Total # of visitors that converted as leads by filling out a form

45
(45% Ratio)

MQLS — Marketing Qualified Leads fit the demographics of what a good customer looks like

15.75
(35% CR)

SQLS — Sales Qualified Leads are ready to be engaged in the sales process

5.5
(35% CR)

OPPORTUNITIES — Opportunities are open deals

2
(40% CR)

CUSTOMERS — Total # of **monthly** customers gained with inbound

FOUNDATIONAL STRATEGY

PURPOSE: We use what we learn about your business to create a guide called the Inbound Marketing Plan & Playbook. This is where you'll find the foundational work required for the new website and to initiate your inbound marketing program.

RECOMMENDATION

Details for each recommended playbook "chapter" found on the following pages

	PRS & WEIDERT GROUP	PRS	WEIDERT GROUP
WEEK 1	• Mission & Vision Clarity Workshop		• SEO Landscape Analysis • Competitive Review begins
WEEKS 2-4	• Kickoff Meeting, Internal Interviews, Buyer Journey Workshop	• Persona Profile Homework	• Persona Profiles • Competitive Advantage & Positioning • Messaging
WEEKS 5-7			• Lead Qualification & Marketing Automation Strategy • Reporting & KPI Dashboards Creation
WEEK 8	• Playbook Presentation		

MISSION & VISION CLARITY WORKSHOP

Because we understand this partnership is the beginning of a long journey for PRS and your PE backers, it's important that we gain a shared understanding of the anticipated mission you're embarking on, and the vision of what you're aiming to build and achieve. We believe we can accomplish this with a 3-hour workshop that starts with framing your mission today about what you represent to your ideal customers. Vision builds on that by articulating what you aspire to become in PRS' foreseeable future (3-5 years) to your key constituents.

KICKOFF DAY

The kickoff day is when we start to frame PRS' strategic inbound marketing plan and playbook. This day of in-person meetings will take place at the Weidert Group or PRS office. The agenda of the kick off day includes, but is not limited to:

- A further deep dive into understanding the nuances of your **business model and growth aspirations**
- Discussion on what the **ideal customer** looks like to inform persona development, how you **compete and win,** and **messaging**
- Discussion on **lead qualification and management**
- **SEO needs & goals** discussion
- **Buyer Journey Workshop**

SEO LANDSCAPE ANALYSIS

The evaluation of the current SEO landscape includes an overview of the organic performance of your direct competitors, as well as identifying any additional sites competing for the same keywords. This data, combined with the discovery from our workshops, will **inform the right mix of content types and keyword targets for PRS.**

COMPETITIVE REVIEW

The review identifies what competitors are doing online (right and wrong), what their main message to prospects is, what kind of brand they've created, and **where our opportunities are relative to their activities**.

PERSONA DEVELOPMENT

Personas draw a detailed picture of the people we want most to attract to the website and content. The demographics and psychographics help us create copy that zeros-in on their unique needs, aligns with how they think, speaks their language, and can be written to overcome hurdles/reluctance/skepticism we believe they have. This will allow us to create content that has power to motivate them to work with PRS.

COMPETITIVE ADVANTAGE & POSITIONING

(STRATEGIC BRIEF)

From the review of existing marketing assets, and competitive review, we define what PRS does better than anyone; your most meaningful advantage over competitors. From that we develop a positioning statement articulating who we're talking to, what they want, how we deliver it, and how we want to make the prospect feel. The strategic brief **summarizes what we've learned and adds insights; outlines where opportunities are and how we'll act on them.**

MESSAGING

Based on all previous work we develop primary messaging: **what we will say that will mean the most to our prospects, and what will be most effective in motivating them to PRS.** These messages are foundational to all content (blogs, web, & advanced content) and social media.

LEAD QUALIFICATION & MKTG AUTOMATION STRATEGY

Our lead qualification strategy is based on specific information we want to gather in order to qualify and segment lead conversions as well as to develop the most appropriate nurturing workflows. This will help ensure that we're **keeping leads engaged with content that moves them further along in their buyer journeys**. Nurturing workflows are designed to communicate with prospects throughout their buyer journeys with the goal of moving them down the sales funnel. We'll identify each lead type and the best way to segment them for future nurturing workflows and ongoing communication, as well as thresholds for lead handoff and any specific internal workflows needed.

CRM MGMT STRATEGY FOR MKTG CONTACTS

Determining the strategy for initial setup of Marketing Contacts in HubSpot CRM will help you **manage contact limits** according to HubSpot license contract parameters. We'll define needs for setup, including automation criteria and any reporting needs in HubSpot.

INITIAL EDITORIAL CALENDAR

Based on learnings and discussions in this initial foundational strategy phase, Weidert Group will compile an initial editorial calendar with 12 recommended blog article topics including a draft blog headline, target persona(s), and target keywords.

REPORTING & KPI STRATEGY

Because tracking performance and adjusting as necessary are core to the success of inbound marketing, the KPIs identified are those we will monitor, analyze and report on during regular review calls. PRS' performance against industry benchmarks will be closely evaluated and will **guide our recommended activity adjustments**.

FINAL PRESENTATION

A 2-hour presentation will be scheduled to share the completed Inbound Marketing Plan & Playbook.

PURPOSE: Once your Inbound Marketing Plan & Playbook strategy is set, we'll complete the following setup items to prepare for your ongoing inbound program.

QUICK-START HUBSPOT ONBOARDING & SETUP

- Contact list analysis using NeverBounce tool from ZoomInfo for real-time email verification and email cleaning and import into HubSpot
- List segmentation and initial form setup
- Setup company data, time zone, currency, connect social media accounts, install tracking code, filter internal traffic
- Update logo favicon, colors, define email types, configure AMP settings, blog settings, subscription options, connect website and email sending domain, connect GA4 & Google Search Console
- Add users and establish permission sets
- GDPR compliance setup
- Creation of Call-to-Action (CTA) template in HubSpot
- Two (2), 1 hour HubSpot training calls

MARKETING CONTACTS MAINTENANCE SETUP

- Based on strategy/needs in Inbound Plan & Playbook, implement the appropriate settings and build automation, lists, contact views, reports in HubSpot
- Create SOP that documents definitions and process for future forms, chatflows, etc.
- Set up Contact View to review and bulk change contacts from Non-Marketing to Marketing and vice versa to monitor limits and ensure the right contacts receive emails

MARKETING AUTOMATION INITIAL SETUP

- Setup of basic email workflow automation per recommendations in the Inbound Plan & Playbook
- Setup of backend automation for ongoing lead segmentation and lead alerts
- Lead scoring setup

PURPOSE: Once your Inbound Plan & Playbook strategy is set, we'll complete the following setup items to prepare for your ongoing inbound program.

HUBSPOT REPORTING DASHBOARDS

- Setup of core reporting dashboards in HubSpot per recommendations in the Inbound Plan & Playbook

VIDEO & PHOTOGRAPHY (HALF DAY SHOOT)

Investing in updated, high-quality video & photography is a critical part of your marketing and recruitment strategy. The assets we capture can and will be used in multiple ways for years to come. Having a library of your own photos and video allows you to create content that reflects the PRS brand and culture, which will fuel your inbound and recruitment efforts. This half day shoot will take place in and around your facilities in Green Bay and includes:

- **B-Roll Video:** Before we have PRS budget for specific video projects (facility tour, about us, etc.) we would like to begin with capturing on-site b-roll video of your people, facilities, and product offerings. This will add motion and visual interest on your website and social media profiles, and can be repurposed for future videos.
- **Photography:** On-site photography of your people, facilities, and products. We would work to identify the setups and areas of focus that would best tell the PRS story through still photography. The imagery will be used in a variety of applications, such as the website, sales collateral, presentations, advanced content pieces, and paid ads

PURPOSE: To quickly implement some potential lead converting assets in HubSpot that can be featured on the current PRS website, while we work on the foundational Inbound Plan & Playbook and new website.

CURRENT WEBSITE HOMEPAGE ADJUSTMENTS

While the new website is being built, the current homepage would benefit from a few small adjustments to better attract and engage website visitors:

- Incorporate slide-in call-to-action (CTA) for initial kickstart campaign content offer
- Incorporate simple "Connect With Sales" form on homepage
- Improve the homepage's on-page SEO (page title, meta description, and slight keyword adjustments within page content)

CONTENT KICKSTART CAMPAIGN

Create an initial gated content offer that will be valuable to your primary personas, to be promoted on the current website and to use when the ongoing program starts.

- Write and design (1) 4-8 page eBook or visual guide
- Develop corresponding conversion form, landing page, graphic CTA button for placement on current PRS website, and email campaign

PURPOSE: You can expect regular contact with your team and others (our president is always available to talk, as is anyone else in the agency). Our teams hold regular status calls to discuss progress and touch base on outstanding items. But communication is essentially ongoing – we respond quickly, we answer questions thoroughly and we offer insights when we see a need for changes to be made to your program.

LEVEL 2 MEETINGS & SUPPORT

(1) 30-minute virtual status call every other week (starting in August) with agenda and call summaries, plus ongoing program management for the months of the foundational program.

Weidert Group

- Provide agenda and call summaries for each status call

PRS

- Attend status calls every other week

SALES PROCESS PROJECT

JULY THROUGH SEPTEMBER

MONTH 1 - SALES PROCESS MAPPING & HUBSPOT SETUP

Review Your Sales Process

- Meet with you and your sales team to understand their challenges, how they're currently selling, and identify your deal stages

Mapping Your Sales Process

- Identify your optimum sales process, deal stages, and pipelines

Migrating Your Data

- We will migrate you existing data and begin cleaning it
- There will be a separate charge for this once we've analyzed the data and can determine scope

CRM Deal Stage Evaluation and Exit Criteria

- Customize one or multiple pipelines based on persona and/or product/service

Onboard your Sales Team

- Setup Sales Hub Professional for Corey and 1-2 initial sales reps. Work with them to integrate email, calendars, signatures, etc.

Custom Fields and View Creation

- Set up lead views, segmentation, and custom fields

Reporting Dashboard Setup (Company Level)

- Setup initial dashboards

Email Template Creation and Optimization

- Setup email templates for the sales team
- Take advantage of existing best performing emails if possible

MONTH 2 - SALES AUTOMATION & TRAINING

Train sales team (beginning of partial-team, or full-team training)

- Meet and train on processes specific to PRS

Set up Teams

- Organize your salespeople by teams inside of HubSpot

Playbooks

- Build out Playbooks for the Sales team

Playbook Training

- Train the sales team on the use of Playbooks

Set up Workflows and Automations

Examples:

- Automated lead assignment
- Lead notifications
- Automated deal creation
- Automated Tasks
- Prescribed custom workflows
- Sequence Creation & Optimization

Create email sequences

Examples:

- Onboarding
- Following up after a first meeting
- Re-igniting a dead deal

* Note the above automation & sequence examples will be replaced with what is actually needed once we complete Phase 1.

MONTH 3 - OPTIMIZATION & REPORTING

Training Sales Team (partial-team, or full-team)

- Continue group training and one-on-one training where needed

Lead Scoring

- Review Predictive Lead Scoring
- Build out Custom Lead Scoring to use in conjunction with Predictive Lead Scoring

Email Sequence Optimization

- Ongoing optimization (A/B testing, analyze open/click/response rate)

Reporting Dashboard Setup

- Customize Dashboards for Management and Sales C-Level, Management, and Individual Sales

  Reps

CRM Ongoing Optimization & Administration

- Meet with PRS sales team to review what is working and what needs changing

WEBSITE

ASSUMPTIONS

Platform HubSpot

Strategy
Strategic direction is critical to a successful website project. This launchpad site proposal assumes the following strategic work has been completed in the Foundational Work phase prior to the build of the site:
- SEO Landscape Analysis
- Scoping
- Key messages, including approach & tone

Page Content
Stock photography and iconography when appropriate. Additional photography provided by PRS and from the proposed video/photo shoot Weidert Group will conduct. Copy to be provided by Weidert Group with review by PRS.

Communication
A Google Drive folder will be shared with PRS' main contact in order to transfer files to and from Weidert Group. Files from Weidert Group will be emailed and stored on Google Drive for redundancy. Frequency of status meetings depend on phase of project and timeline.

Approval Process
All signed project approvals are to be returned from PRS' main appointed contact to the assigned Weidert Group Consultant throughout the project. Time allotted for approvals range from 1–5 days and will be communicated on the project timeline.

DELIVERABLES

What You're Getting
A brand new website that is:
- Mobile-responsive
- Built with a modern and eye-catching design
- Optimized for Inbound potential including a better path for leads/sales inquiries, greater focus on careers/recruitment and culture
- Optimized for User Experience (UX) using best practices
- Optimized for technical SEO
- Foundational to allow continued growth, optimization, and improvements
- Easy for the PRS marketing team to make quick updates and additions

	ACTIVITY	DELIVERABLES
PHASE 1	**SEO**	• Website Health Analysis
PHASE 2	**Scope**	• Discussion guide • Scope meeting
PHASE 3	**Timeline & Architecture**	• Timeline of work • Architecture of website • Architecture meeting (optional) • Revised estimate if applicable
PHASE 4	**HubSpot Setup**	• Blog settings • Google Analytics, Search Console, and Tag Manager setup • Email settings • IP filters • Email DNS
PHASE 5	**Content**	• Copywriting for up to 17 pages (product HubDB content to be provided by PRS) • Additional copywriting support • Stock photography and iconography
PHASE 6	**Mockups**	• (3) design mockups
PHASE 7	**Wireframes**	• (12) wireframes
PHASE 8	**Development**	• Up to (15) total website templates (not including templates below) - 4 of these are HubDB templates • (3) Email templates • (1) Landing page template • (1) Thank You page template • (4) System templates • (3) Subscription • Set up any new CSS styling • Create new menu • Create new footer • Browser mobile testing
PHASE 9	**Go Live**	• Final site audit • Final DNS setup • XML sitemap submission

4-MONTH INBOUND ROADMAPS

ROADMAP 1: DEC THROUGH MAR

ATTRACT:

BLOG ARTICLES

PURPOSE: Companies that make a commitment to regularly publish quality content to their blogs reap the biggest rewards in terms of website traffic and leads – and those results continue to pay out over time.

- Improve SERP rankings
- Demonstrate your knowledge and authenticity
- Build prospect trust and credibility
- Provide prospects help with no strings attached
- Allow a broad audience to regularly engage and provide affirming online votes on your behalf

Weidert Group

- Write (10) blogs/4-month roadmap, format and publish in HubSpot
- Includes interviews w/ SMEs for (3) of the blogs

PRS

- Review and approve blog articles
- Provide access to SMEs as needed

ATTRACT:

CONTENT PROMOTION

PURPOSE: Your content must be seen by your best prospects to have power to build your business.

- Distribute content and engage with target buyers
- Advance leads through the buyer journey
- Alert contacts who download content that you've got additional content they'll find useful

PRS

- Monitor social media channels
- Write and publish regular social media posts using the provided content lead-ins
- Regular posting by select team members on LinkedIn personal profiles (using provided lead-ins)

ENGAGE:

TARGET-SPECIFIC ADVANCED (GATED) CONTENT

PURPOSE: The more advanced content (eBooks, guides, case studies, tip sheets, infographics, etc.) you have as conversion offers, the greater your chances of turning up as a search result to a target's question or need and turning him or her into a lead — and a customer.

- Turn visitors into leads
- Attract new leads and re-engage existing leads
- Allow for "next conversion" opportunities
- Capture lead data

Weidert Group
- Create (1) advanced content pieces (2-8 page ebook or guide) with content support landing page, thank you page, email, and CTA graphic

PRS
- Review and approve content
- Provide access to SMEs as needed

ENGAGE:

NEW WEBSITE PROMO EMAIL + BI-MONTHLY BLOG RECAP

PURPOSE: Targeted and relevant emails to segments of your customer and prospect list are a powerful way to stay in front of these contacts and keep them engaged.

- Continually encourage contacts to come back to the website and engage with new content
- Allow for "next conversion" opportunities
- Capture additional lead data

Weidert Group
- Create (1) promo email to announce and promote the new website once it has launched
- Create (2) bi-month blog-in-review emails, to recap and re-promote the latest blog articles
- Launch and monitor emails

PRS
- Review and approve content

ATTRACT, ENGAGE, TRACK/ANALYZE/ADJUST:
ONGOING SEO SUPPORT

PURPOSE: Since SEO is not a one-time event and takes ongoing management to continually improve rankings and meaningful traffic, we recommend including (1) month ongoing SEO analysis, optimization, and support as part of your first roadmap:

- Ongoing monitoring and reporting on SEO progress and new opportunities
- Ongoing assessment of recommended on-page SEO updates/refinements based on keyword rankings data
- Ongoing assessment of backlink opportunities and the possibility of once per quarter backlink campaigns

Weidert Group

- Ongoing SEO analysis and management includes determining a priority list of improvements/corrections from SEO audit
- Ongoing corrections of search engine crawl errors/usability alerts from Google, ongoing on-page SEO updates, website page updates/additions, etc.

TRACK/ANALYZE/ADJUST:
LEVEL 2 MTGS & MARKETING SUPPORT

PURPOSE: You can expect regular contact with your team and others (our president is always available to talk, as is anyone else in the agency). Our teams hold regular status calls to discuss progress and touch base on outstanding items. But communication is essentially ongoing – we respond quickly, we answer questions thoroughly and we offer insights when we see a need for changes to be made to your program.

(1) 30-minute status call every other week with agenda and call summaries, plus time budgeted each quarter for program management and marketing support as needed. Also includes access to HubSpot reporting dashboards for 24/7 reporting.

Weidert Group

- Provide agenda and call summaries for each status call

PRS

- Attend status calls every other week

TRACK/ANALYZE/ADJUST:

4-MONTH ROADMAPPING

(INCLUDES 4-MONTH EDITORIAL CALENDAR)

PURPOSE: Every 4-months we assess and fine-tune your inbound program based on what we see is working, what's not, and new challenges and opportunities you may be facing. Sometimes little change is needed and the roadmap for the next 4-months is very similar; other times we'll take bigger steps to optimize performance or pursue emerging opportunities. Includes meeting to review previous quarter and discuss next quarter's goals and recommendations.

Weidert Group
- Prepare monthly reporting on key metrics
- Prepare 4-month roadmap recommendations based on data, including editorial calendar for content creation and publishing (blog/vlog, advanced content, and video content

PRS
- Attend roadmap meeting; approve next 4-month roadmap

ATTRACT:

CONTENT WORKSHOP

PURPOSE: A dedicated inbound program requires a healthy amount of content and a great way to gather content ideas is a content workshop. We'll discuss your personas and their buyer's journeys and strategize around your brand purpose and how that can translate into authority-building content.

The latter part of this workshop will be spent brainstorming content ideas together, filling the content wishlist with a variety of topics that satisfy the range of content needed for a successful SEO and content strategy.

Weidert Group
- Facilitate 2-hour workshop
- Compile and organize content ideas from workshop

PRS
- Attend and participate in workshop

The first 4-month roadmap is our recommended core program for PRS. As your program matures and needs change, Weidert Group will recommend additional services in future roadmaps that build upon the core program. These services may include but are not limited to the services listed below:

LEAD NURTURING

- Workflow plans and content

TRADE SHOW SUPPORT

- Signage, campaigns, and more

PAID ADS

- Targeted, pay-per-click advertising on LinkedIn, YouTube, and Google

WEB DEVELOPMENT

- Additional web enhancements/additions

VIDEOS

- Pre-production, post-production, and everything in-between

RECRUITMENT MARKETING

- Employer branding, recruitment marketing assets and projects

PR

- Press releases, additional promotion

TARGET-SPECIFIC ADVANCED CONTENT

- 2-8 page content piece
- 9+ page content piece
- Infographic
- Calculator
- Sales collateral
- Press release, including distribution
- Webinar support
- Content support set (landing pg., thank you pg., email and CTA graphic)

HUBSPOT TECH STACK

WHY HUBSPOT MAKES SENSE FOR PRS

- A single platform to unify marketing, sales, and service
- Powerful automation possibilities to help the PRS team close more sales efficiently
- Easy to learn and to implement quickly (for a fast ROI)
- The fastest, smartest, and most-secure website CMS platform available, with the ability to add eCommerce functionality
- Automated, closed-loop reporting to see how specific marketing efforts are driving revenue
- Impressive integration possibilities with the Epicor ERP and other platforms used by PRS
- Ability to setup online job applications, track job candidates, and automate communication throughout the interview process
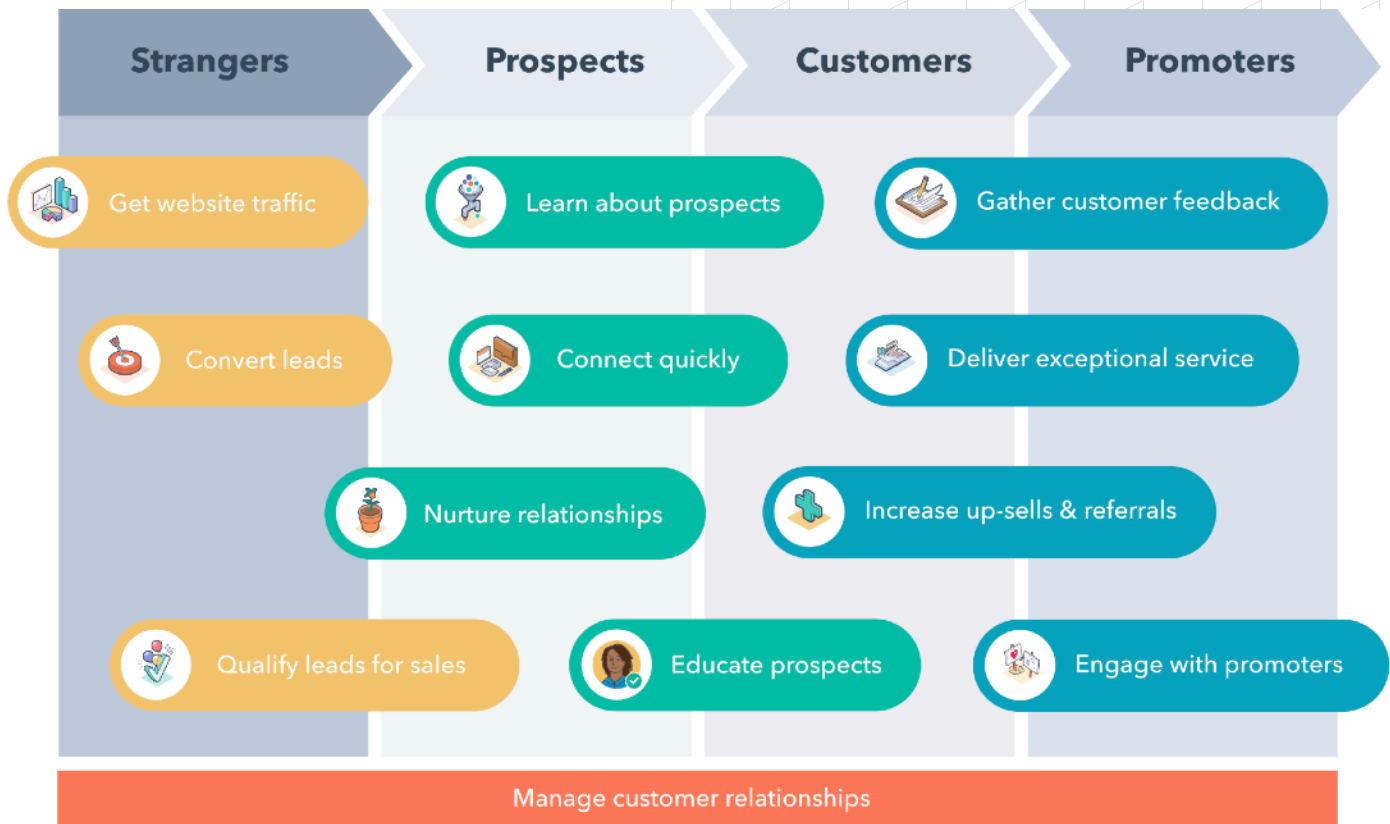
Based on PRS' goals, opportunity areas for growth, and the current lack of the required marketing & sales tools, Weidert Group recommends the following HubSpot tech stack:

MARKETING HUB ENTERPRISE

Overview of Features

- Powerful marketing automation
- SEO tools
- Social media monitoring & publishing tools
- Email, blog & content creation tools
- Revenue attribution/closed-looped reporting
- Custom integration properties (to integrate Epicor ERP)
- Event-based triggers for lead alerts, segmentation, and handoff to Sales

Benefits for PRS

- Centralized platform for Weidert Group and PRS to collaborate on all inbound marketing efforts
- Automation possibilities are endless and will save time and efficiently capture, nurture, and handoff leads
- Fully supported by one of the best marketing automation support teams in the world

SALES HUB PROFESSIONAL

Overview of Features

- Sales automation
- Email sequences
- Sales Playbooks
- Custom sales reports/dashboards
- Sales forecasting
- Custom deal pipeline

Benefits for PRS

- Easy to learn and adopt the tools for immediate impact
- Full visibility of sales KPIs and PRS' growing sales funnel
- Eliminates a lot of manual sales/CRM tasks for the sales team, so they can focus on selling

CMS HUB PROFESSIONAL (FOR WEBSITE)

Overview of Features

- Easy to add/modify pages
- A/B testing
- Dynamic personalization
- Smart content & reporting
- SEO recommendations & optimizations
- Security monitoring & threat detection

Benefits for PRS

- Simple, drag and drop editor for quick page updates and creation of new pages
- Built-in reporting and automation possibilities
- Includes hosting within the Amazon server network for the highest uptime and fast performance

ABOUT US

WEIDERT GROUP

INC. 5000

AMERICA'S FASTEST-GROWING PRIVATE COMPANIES

W

YOUR TEAM

ACHIEVEMENTS

- We've been a HubSpot partner since early 2011, and we practice all that we preach
- We reached Diamond level partner status in 2020
- We've won multiple North America HubSpot Impact awards for website and inbound results
- Multiple winner of various Best Company awards
- Earned a spot on the 2022 "Inc. 5000" list of the fastest-growing private companies in America

THE TEAM

- 39 full-time, employees (32 NE WI, 7 remote)
- Employee-owned company (ESOP) since 2017
- Full-service – we offer every capability needed to thoroughly execute an integrated inbound program

EXPERIENCE

- For 30 years we were a traditional marketing firm. We formalized our inbound transition in 2011 and now help clients do the same. We know how to jump the hurdles, minimize pushback from Sales, and plug in to start getting leads from the moment a program is implemented

EXPERTISE

- Every one of our 39 teammates is certified by HubSpot as having the highest level of expertise in inbound marketing methodologies and additional related inbound certifications that broaden our capabilities

OUR SPECIALIZED EXPERIENCE

We've developed programs and write content for complex industries and companies such as:

progea   OmPrompt   KloudData   Kett

SOLVOYO   SAP   Preact   INVESTORS COMMUNITY BANK

KAYSUN   U.S. Lubricants   EDL   MCL ENGINEERED SOLUTIONS

MARION   SENTRY   GRANDE CUSTOM INGREDIENTS GROUP   SEAGATE

eSOP PARTNERS   WIPFLi LLP CPAs and Consultants   GORDON FLESCH COMPANY, INC. BUSINESS TECHNOLOGY. MANAGED   HUI CENTERED AROUND YOU

CUNA MUTUAL GROUP   FISHER TANK COMPANY Employee Owned   CRANE ENGINEERING   CRAY

FALCON STRUCTURES   PUMPTEC   CPS architects of what's possible   AK

STROUSE   RITTAL   KÖRBER   ADCo

amcor

CAPABILITIES

Our team helps clients attract qualified new business opportunities online, and assist with nurturing and qualifying those opportunities for the Sales team.

MARKETING STRATEGY

- Branding (logo + positioning)
- Marketing Plan Development

WEBSITE DEVELOPMENT/ OPTIMIZATION

- Website Planning/Strategy
- Website Design
- Website Content Development
- Website Programming
- Search Engine Optimization (SEO)
- Growth-Driven Design (GDD)

DESIGN

- Web Graphics
- Printed Materials
- Tradeshow/Event Graphics
- Signage

CONTENT CREATION & PROMOTION

- Email Campaigns
- Blog Articles
- Downloadable Content Resources: eBooks, whitepapers, infographics, etc.
- LiveChat/Chatbots
- Landing Pages
- Website Copy
- Videos
- Print & Digital Ads
- Public Relations/Press Releases
- Marketing Automation

SALES ENABLEMENT

- Service Level Agreement (SLA)
- Sales Templates (phone + email)
- Sales Library Content
- HubSpot CRM & Tools Training
- Social Selling Training (LinkedIn)

CASE STUDY: WEIDERT GROUP

PROBLEM

- Not differentiated in a meaningful way from our competitors
- Doing cold-calling with little success, or relying on word-of-mouth and networks for referrals

SOLUTION

A comprehensive, integrated IM program that:
- Attracts our best prospects to our website
- Provides relevant content that helps them progress in their buyer journey
- Demonstrates our expertise

1,248 ⟶

90k TOTAL TRAFFIC

290 ⟶

77k ORGANIC TRAFFIC

11 ⟶

500 LEADS

WEIDERTGROUP

SERVICES   ARE WE A FIT?   RESOURCES

WE ARE WEIDERT GROUP

WE HELP COMPLEX INDUSTRIES GROW USING INBOUND.

I'm here because I want to

Select...

INTEGRATED INBOUND MARKETING

W
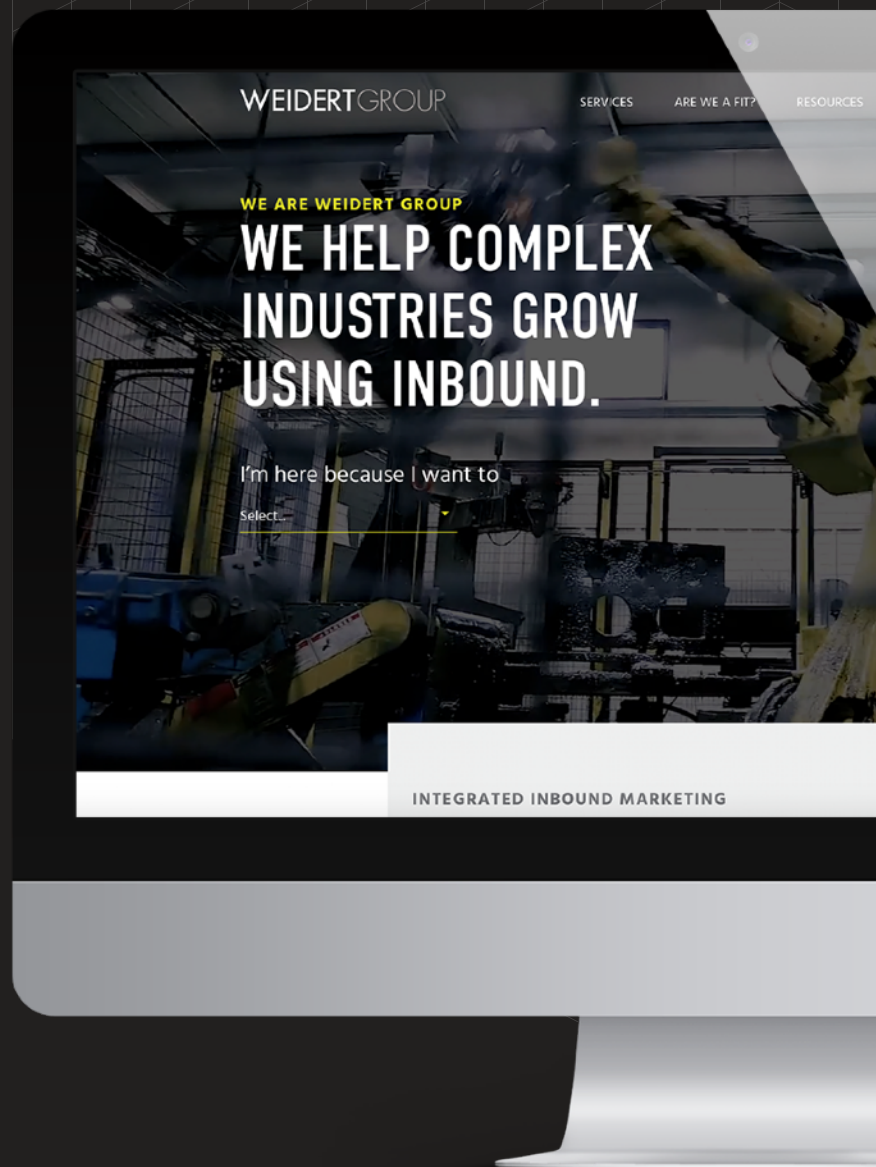
CASE STUDY: FALCON STRUCTURES

PROBLEM

- Take initial inbound efforts to "the next level" to reach short- and long-term goals and KPIs
- Leverage their industrial experience to precisely target and meaningfully engage the right prospects (communicate more clearly to military, construction, manufacturing and other audiences and not to consumers)
- Evaluate the company's existing branding and, if needed, revamp it to be more in line with what the company offers (and what its best prospects are looking for)

Results 4 months after site launch:

86% INCREASE IN ORGANIC VIEWS

738 NEW MQLS

31 NEW CUSTOMERS

14% INCREASE IN MONTHLY SALES

SOLUTION

- New website and implementation of an optimized inbound marketing program, including a comprehensive SEO strategy
- New logo and branding/style guide

HubSpot 2019 IMPACT AWARDS
WEBSITE DESIGN

CASE STUDY: GORDON FLESCH® COMPANY, INC.

PROBLEM

- Poor visibility in organic search
- Outdated website
- The company hadn't effectively communicated the broad range of capabilities or their significant potential value to prospects and customers – many thought GFC was a company whose sole business was to lease office printers

Results 6 months after site launch:

407   NEW MQLS

230   NEW SQLS IN 5MO

$394k   IN NEW SALES OPPS

15   NEW CUSTOMERS

SOLUTION

- New website and implementation of a custom inbound marketing program, including the creation of the GFC blog
- Creation of a Service Level Agreement (SLA) that defined and formalized how leads would be qualified, managed, assigned, and followed up on

"TODAY, GFLESCH.COM IS A FULL-FEATURED WEBSITE TEEMING WITH GRAPHICS, VIDEOS, 600-PLUS BLOGS, FREE DOWNLOADS AND CALLS TO ACTION FOR CLIENTS AND PROSPECTS TO INTERACT WITH THE DEALER. RECENTLY, A LIVE CHAT FEATURE WAS ADDED TO PROVIDE REAL-TIME INFORMATION. IN LESS THAN FIVE YEARS, THE SITE HAS PRODUCED MORE THAN 4,000 LEADS, 1,000+ SALES AND REVENUES OF $13.6 MILLION, OF WHICH $7.5 MILLION IS REPRESENTED BY NET-NEW CUSTOMERS.
THE AVERAGE LIFETIME VALUE OF THE CUSTOMERS IS $187,000, WHICH TRANSLATES TO $82 MILLION OVER THE NEXT 10 YEARS."

View Article

CASE STUDY: PUMPTEC

PROBLEM

Amidst a global pandemic and struggling economy, Pumptec was ill-prepared for selling in a digital world. Manual processes made it almost impossible to share and track information or gauge marketing and sales efforts. In addition, their online presence didn't reflect the robust capabilities, quality, and industry expertise they were known for – and they hadn't published a blog post in seven years.

SOLUTION

A new website using HubSpot CMS and reintroduction of a regular blog and gated advanced content pieces helped Pumptec leverage inbound marketing for business growth. By using HubSpot's full CRM suite and sales enablement tools, Pumptec also reduced friction for their Sales and Service teams through better tracking, managing and responding to prospects and customers.

Results 10 months after site launch:

39% INCREASE IN SALES IN THE FIRST NINE MONTHS

89% INCREASE IN AVG NEW CUSTOMER SALE

33% REDUCTION IN ONBOARDING TIME & SALES CYCLE

"BEFORE WORKING WITH WEIDERT GROUP AND HUBSPOT, WE WERE DOING A LOT OF COLD CALLING. NOW, LEADS ARE FINDING US." – STEVE BABCOCK, PUMPTEC

GDUSA 2022 AMERICAN INHOUSE

DESIGN AWARDS
WINNER

GD USA

GDUSA
GRAPHIC DESIGN USA

| HOME | NEWS ⌄ | FEATURES ⌄ | COMPETITIONS ⌄ | BLOGS ⌄ | NEWSLETTERS | MAGAZINE ⌄ | SUPPLIERS + SERVICES | ABOUT US ⌄ |

2022 AMERICAN INHOUSE DESIGN AWARDS WINNER

Barcoding, Inc. & Weidert Group

Client: Barcoding, Inc. Title: Barcoding Research Study VP of Marketing & Strategic Partnerships: Jody Costa Lead Designer & Content Strategist: Krystal Cotriss Business Coordinator: Iris Huang

View Article
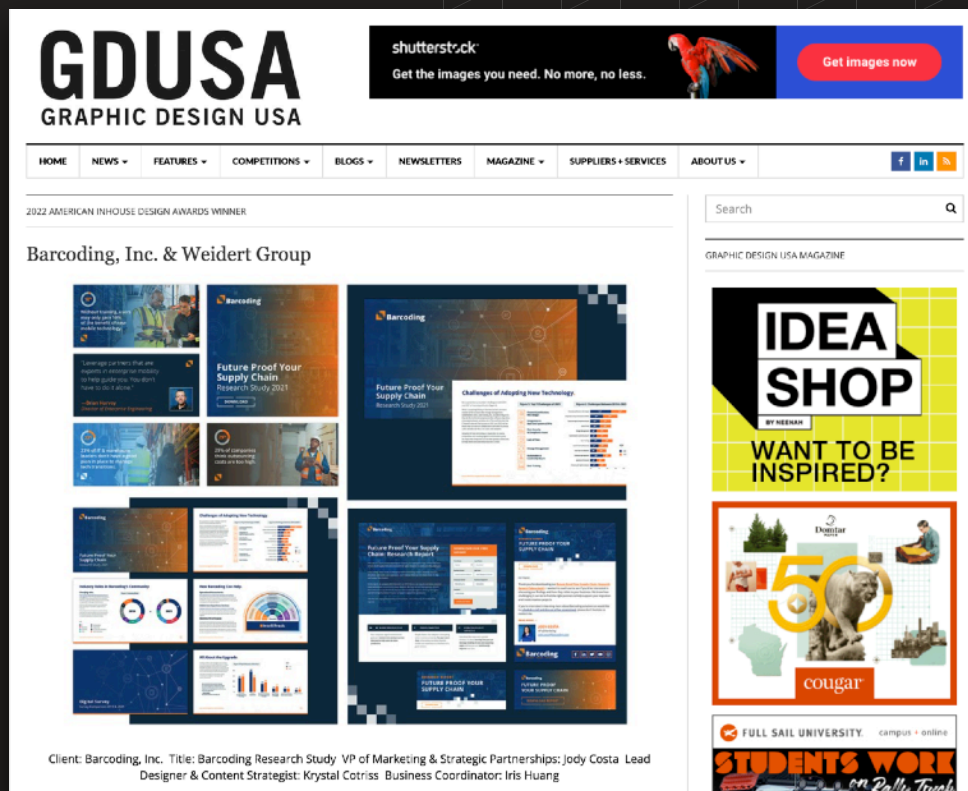
CASE STUDY: RECRUITMENT

PROBLEM

By 2030, it's predicted there will be 2.1 million more open manufacturing jobs than there are skilled workers to fill them. Our client felt the pressure of both the national labor crisis and the scarcity of candidates in and around the small Wisconsin city in which their production facility is located. In fact, the competition is so fierce that we won't even name the company to protect their competitive advantage.

Results in less then 12 months:

101 EMPLOYEES HIRED & ONBOARDED

65k SQUARE FOOT FACILITY EXPANSION

24/7 APPLICATION PROCESSING

SOLUTION

Working closely with our client's HR team, Weidert Group identified the channels, messaging, inbound marketing tactics, and paid digital advertising that would resonate with ideal jobseekers. Targeted content was developed to supplement the enhanced recruitment marketing campaign, including a video, blog article, careers page update, display ads, and social posts.

Automation Technician
3rd Shift

APPLY NOW

Design, Build, Set Up, Test and Maintain Integrated Automated Mechanical Systems

We have an opportunity for an Automation Technician to design, build, set up, test and maintain integrated automated mechanical systems on new and existing equipment, including but not limited to robotics, cameras, sensors, PLCs, and hydraulic/pneumatic systems, to ensure production quality.

"I LIKE THEIR RESPONSIVENESS AND FORWARD, OUT-OF-THE-BOX THINKING."

https://clutch.co/profile/weidert-group

DETAILS

Recommended HubSpot tech stack includes:

Marketing Hub™

Marketing software to help you attract the right audience, convert more visitors into customers, and run complete inbound marketing campaigns at scale.

Premium Features

- ✔ Premium versions of all free tools, plus ...
- ✔ Marketing automation
- ✔ SEO tools
- ✔ Video hosting & management
- ✔ Social media tools
- ✔ Blog & content creation tools
- ✔ Analytics dashboards
- ✔ Over 60 additional features

Sales Hub®

Sales CRM software to help sales teams close more deals, deepen relationships, and manage their pipeline more effectively.

Premium Features

- ✔ Premium versions of all free tools, plus ...
- ✔ Advanced CRM
- ✔ Sales automation
- ✔ eSignatures
- ✔ Predictive lead scoring
- ✔ Email sequences
- ✔ Smart send times
- ✔ Multiple deal pipelines
- ✔ Customizable reports
- ✔ Over 60 additional features

CMS Hub®

Content management software that's flexible for marketers, powerful for developers, and gives your customers a personalized, secure experience.

Premium Features

- ✔ Premium versions of all free tools, plus ...
- ✔ Blog & content creation tools
- ✔ Dynamic content
- ✔ SEO & content strategy
- ✔ Lead generation tools
- ✔ Live chat
- ✔ Security monitoring & threat detection
- ✔ Over 55 additional features

Total: $4,000/month if purchased by the end of June (which is a 10.25% discount)

Note: HubSpot's onboarding one-time fees ($6,750) waived in lieu of working with Weidert Group

FOUNDATIONAL STRATEGY DELIVERABLES	
INBOUND PLAN & PLAYBOOK PHASE 1 (July-Aug 2023)	
Inbound Plan & Playbook Part 1 (July-Aug)	$28,657.50
SETUP (July-Sept 2023)	
Quick Start HubSpot Onboarding & Setup (July)	$4,290
Marketing Contacts Maintenance Setup (July)	$1,732.5
Marketing Automation Initial Setup (Aug-Sept)	$2,516.25
Reporting Dashboards Setup (Aug-Sept)	$1,890
VIDEO/PHOTOGRAPHY SUPPORT (Aug-Sept 2023)	
Half Day Video & Photo Shoot + Organizing Assets (Aug-Sept)	$5,685
KICKSTART EFFORTS (Sept-Oct 2023)	
Current Website Homepage Adjustments (Sept-Oct)	$2,925
(1) 5-8 Page Advanced Content Piece (Sept-Oct)	$3,948.75
(1) Content Support Set (Sept-Oct)	$2,047.50
ACCOUNT MANAGEMENT (Aug-Nov 2023)	
Level 2 Meetings & Support and New Client Onboarding (Aug-Nov)	$14,610
WEBSITE (Sept-Dec 2023)	
Website Redesign & Rebuild on HubSpot CMS (Sept-Dec)	$54,307.50

- **Does not include** WI sales tax for applicable deliverables

FOUNDATIONAL BUDGET

SALES PROCESS PROJECT	
(July-Sept 2023)	
Month 1: Sales Process Mapping & HubSpot Setup	$7,000
Month 2: Sales Automation & Training	$7,000
Month 3: Optimization & Reporting	$7,000

- **Does not include** WI sales tax for applicable deliverables

DELIVERABLES: DECEMBER 2023 – MARCH 2024	
BLOGS	
(7) Technical Blogs	$8,190
(3) Technical Blogs w/Interviews	$4,387.50
CONTENT WORKSHOP	
Weidert-facilitated Content Workshop	$3,956.25
TARGET-SPECIFIC ADVANCED CONTENT	
(1) 2-8 Page Advanced Content Piece	$3,948.75
(1) Content Support Set	$2,047.50
SEO	
Ongoing SEO Support	$630
EMAILS	
(2) Blog-In-Review Emails (using automated template)	$247.50
(1) Website Promo Email	$742.50
4-MONTH ROADMAPPING	
Quarterly Roadmap & Ed Cal Planning	$5,040
ACCOUNT MANAGEMENT + FLEX SUPPORT	
Level 2 Meetings & Support (bi-weekly calls)	$10,237.50
Flex Marketing Support	$2,500

- **Does not include** WI sales tax for applicable deliverables

WEIDERT GROUP BUDGET

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
FOUNDATIONAL SETUP, SUPPORT, & WEBSITE (Apr-Sept)									
Inbound Plan & Playbook	$14,328.75	$14,328.75							
Foundational Setup	$6,022.50	$2,203	$2,203						
Half Day Video/Photo		$2,842.50	$2,842.50						
Kickstart Efforts			$4,461	$4,461					
Level 2 Support		$3,652.50	$3,652.50	$3,652.50	$3,652.50				
Sales Process Project	$7,000	$7,000	$7,000						
Website Redesign			$13,577	$13,577	$13,577	$13,577			
1st 4-MONTH ROADMAP (Dec-Mar)									
Inbound Program						$10,482	$10,482	$10,482	$10,482
Subtotal	$27,351.25	$30,026.75	$33,736	$21,691	$17,229.50	$24,059	$10,482	$10,482	$10,482
HubSpot License	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000
TOTAL	$31,351.25	$34,026.75	$37,736	$25,691	$21,229.50	$28,059	$14,482	$14,482	$14,482

- **Does not include** WI sales tax for applicable deliverables

2023 Budget = $154,093.50 (Weidert) + $24,000 (HubSpot) = $178,093.50

2024 Potential Budget = $144,000-$160,000 (Weidert) + $48,000 (HubSpot) = $192,000-$208,000

FOUNDATIONAL PHASE

INBOUND PLAN & PLAYBOOK PHASE 1 (July-Aug 2023)

Mission & Vision Clarity Discussion	3 Hours (per attendee)
Kickoff Day	4-5 Hours (per attendee)
Final Presentation	2.5 Hours (per attendee)

SALES PROCESS PROJECT (July-Sept 2023)

Month 1 (July)	6 Hours (per attendee)
Month 2 (Aug)	4 Hours (per attendee)
Month 3 (Sept)	4 Hours (per attendee)

MEETINGS & SUPPORT (Aug-Nov 2023)

Bi-Weekly Status Calls	1 Hour (per month)

WEBSITE (Sept-Dec 2023)

Scoping Homework + Meeting	2 Hours (1 hr homework, 1 hr meeting per attendee))
Design Mock-ups Presentation	1.5 Hours (per attendee)
Wireframe Review	1 Hour (per reviewer)
Content Review	3-4 Hours (per reviewer)
Staged Website Review (before go live)	2-3 Hours (per reviewer)

ONGOING PROGRAM

ROADMAPS/CORE PROGRAM (Starting in Dec)

Roadmap Meetings (every 4 months)	1.5 Hours (per attendee)
Bi-Weekly Status Calls	1 Hour (per month, per attendee)
SME Blog Interview Calls	0.75 Hours (per interview)
Content Review	1 Hour (per week)
Social Media Management/Content Promotion	2 hours (per week)

- Any work performed by Weidert Group remains the intellectual property of the Agency until it is paid for in full by the Client

- Production timelines may vary due to many interdependent factors, including but not exclusive to delay of Client input and approvals at each stage of the development process

- Client changes above and beyond stated scope during the development process could also delay timelines and will be subject to additional charges not outlined in this Agreement

- Terms: 1% 10, net 30. Paid ads NET 10. Finance charges are 18% on an annual rate and 1.5% on a monthly rate on past due balances

- Proposal is null and void after 30 days without completed signatures

LET'S DO THIS!

COMPLETE THE FOLLOWING STEPS AND WE'LL GET STARTED!

1   Review proposal and provide feedback

2   Sign Weidert Group formal estimates for foundational period, setup items, website, etc.

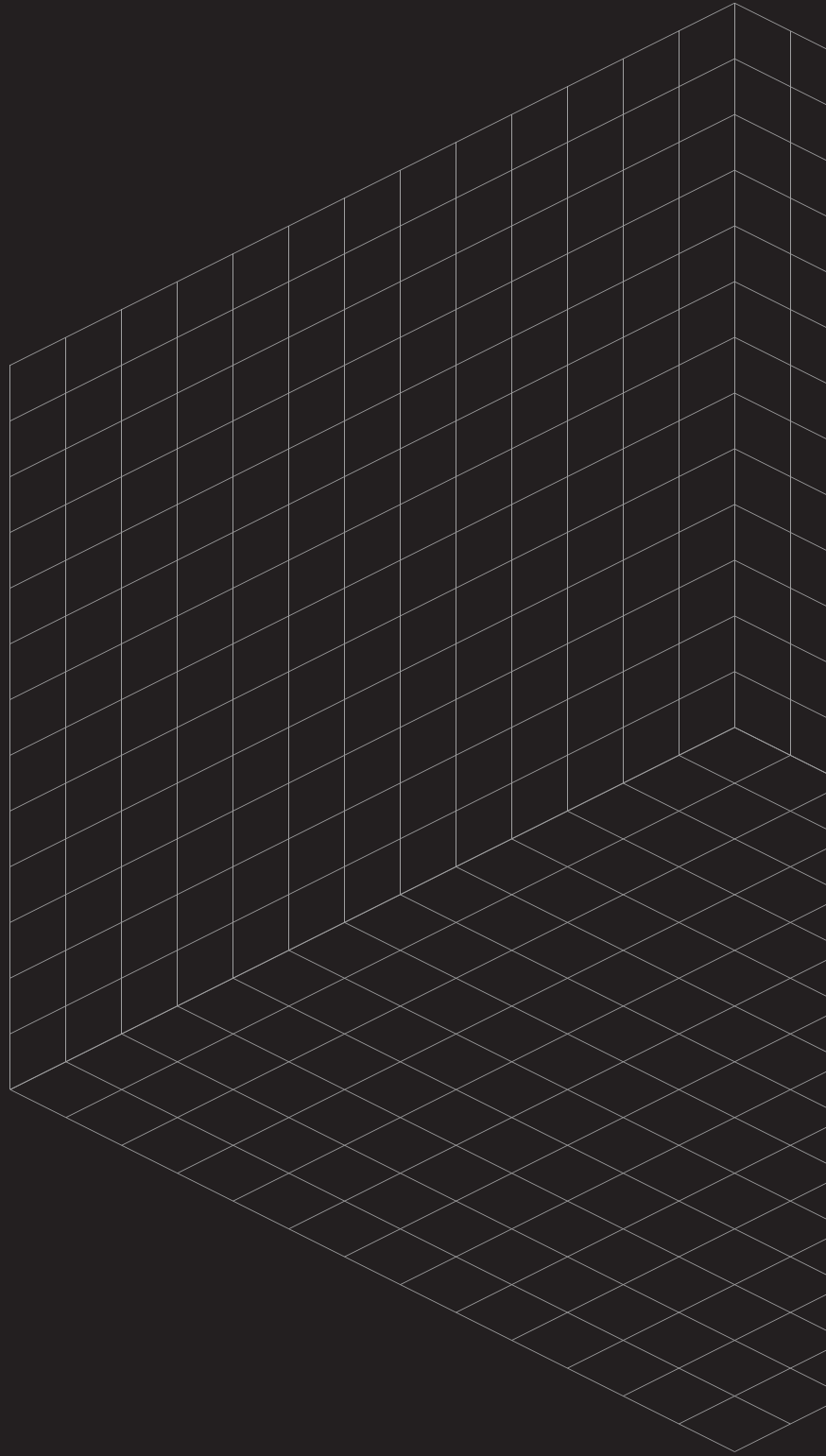**3**   Work with Weidert Group to finalize license agreement with HubSpot by the end of June

4   Schedule the Kickoff Meeting, Website Scoping Meetings and Plan/Playbook Workshops!

WEIDERT GROUP

APPENDIX

The following Plan & Playbook chapters will be incorporated into future roadmaps, to help round out PRS' inbound strategy for the ongoing program.

SEO & CONTENT STRATEGY

This is where we combine all of the inputs gathered throughout the Inbound Marketing Plan & Playbook process and build a focused SEO and content strategy that will **provide brand awareness and SERP visibility, qualified leads, and increased domain authority via backlinks and other content partnerships**. The SEO and content strategy includes:

- Recommended ratio of content focus areas (awareness, lead gen, authority building and thought leadership)
- Focused topic clusters backed by extensive keyword research
- Initial buyer's journey content maps
- Strategy for purpose-driven SEO partnerships, if applicable
- SME and topic lists for thought leadership content
- Link building strategy
- Off-page SEO opportunities
- Updating HubSpot SEO Topics tool with topic cluster keywords
- Setting up a Search Insights Report with appropriate data
- Adding target keywords to SEMrush for ongoing position tracking
- Creation of Buyer's Journey Content Maps

CONTENT PROMO STRATEGY - SOCIAL MEDIA & PAID ADS

This section outlines the relative value of organic social media platforms for use as promotion tools for PRS's content, and **outlines protocols for engagement**, and includes how Paid Ad channels (Google, LinkedIn, Facebook) will also be leveraged. The recommended engagement is based on your prospects' likelihood to be on specific platforms and the types of issues/challenges they're experiencing.