

ESOP PARTNERS

GROWTH WITH INBOUND



WEIDERTGROUP



MARKETING GOAL

It's the shared goal of ESOP Partners and Weidert Group to develop an inbound marketing and sales program that produces the quantity and quality of leads needed to help achieve the following growth goals:

- 300 clients by end of 2021; 1,500 clients by 2025

GROWTH WITH INBOUND

The recommended growth strategy for ESOP Partners starts with a strategic plan and playbook along with 90-day roadmaps to build and continuously improve a custom inbound program.

1

SET THE INBOUND STRATEGY

Develop the Playbook for the ESOP Partners' inbound program, strategize, and set-up foundational items

TIMELINE: March - May

2

KICKSTARTERS

Identify kickstarters while inbound program is being established

TIMELINE: April - May

3

INITIATE THE CORE PROGRAM

Attract, engage, and delight leads and customers for ESOP Partners; continuous improvement and optimization

TIMELINE: Starts June



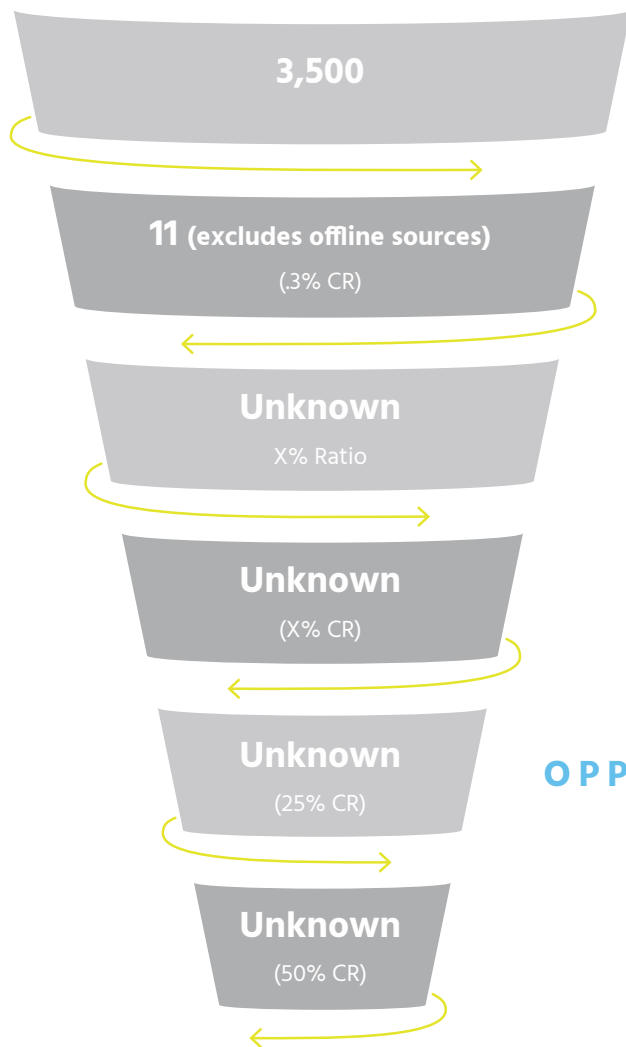
WEIDERT GROUP'S PROMISE:

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

BD FUNNEL: CURRENT

Base KPIs we've been able to gather based on current HubSpot data.

CURRENT FUNNEL METRICS

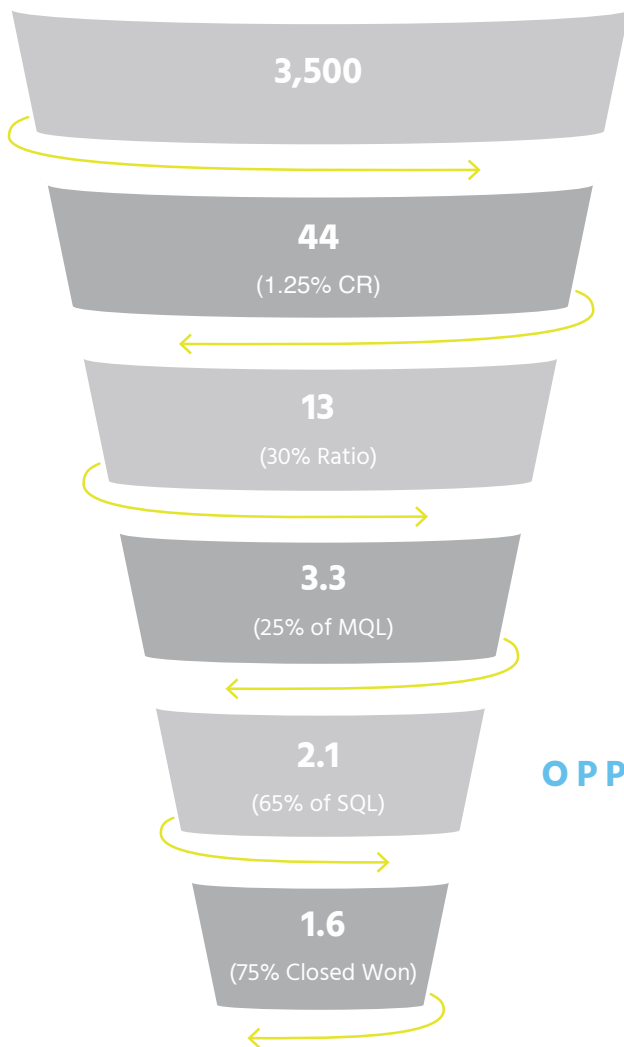


- SESSIONS** Total number of **monthly** sessions to the site
- CONTACTS** Total # of visitors that converted as leads by filling out a form
- MQLS** Marketing Qualified Leads fit the demographics of what a good customer looks like
- SQLS** Sales Qualified Leads are ready to be engaged in the sales process
- OPPORTUNITIES** Opportunities are open deals resulting in proposals
- CUSTOMERS** Total # of **monthly** customers gained with inbound

BD FUNNEL: IMPROVED

Base KPIs we'll measure as we collect data from ESOP Partners' new inbound marketing program.

CURRENT METRICS, IMPROVED



SESSIONS

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

CONTACTS

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

MQLS

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

SQLS

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

OPPORTUNITIES

Opportunities are open deals resulting in proposals

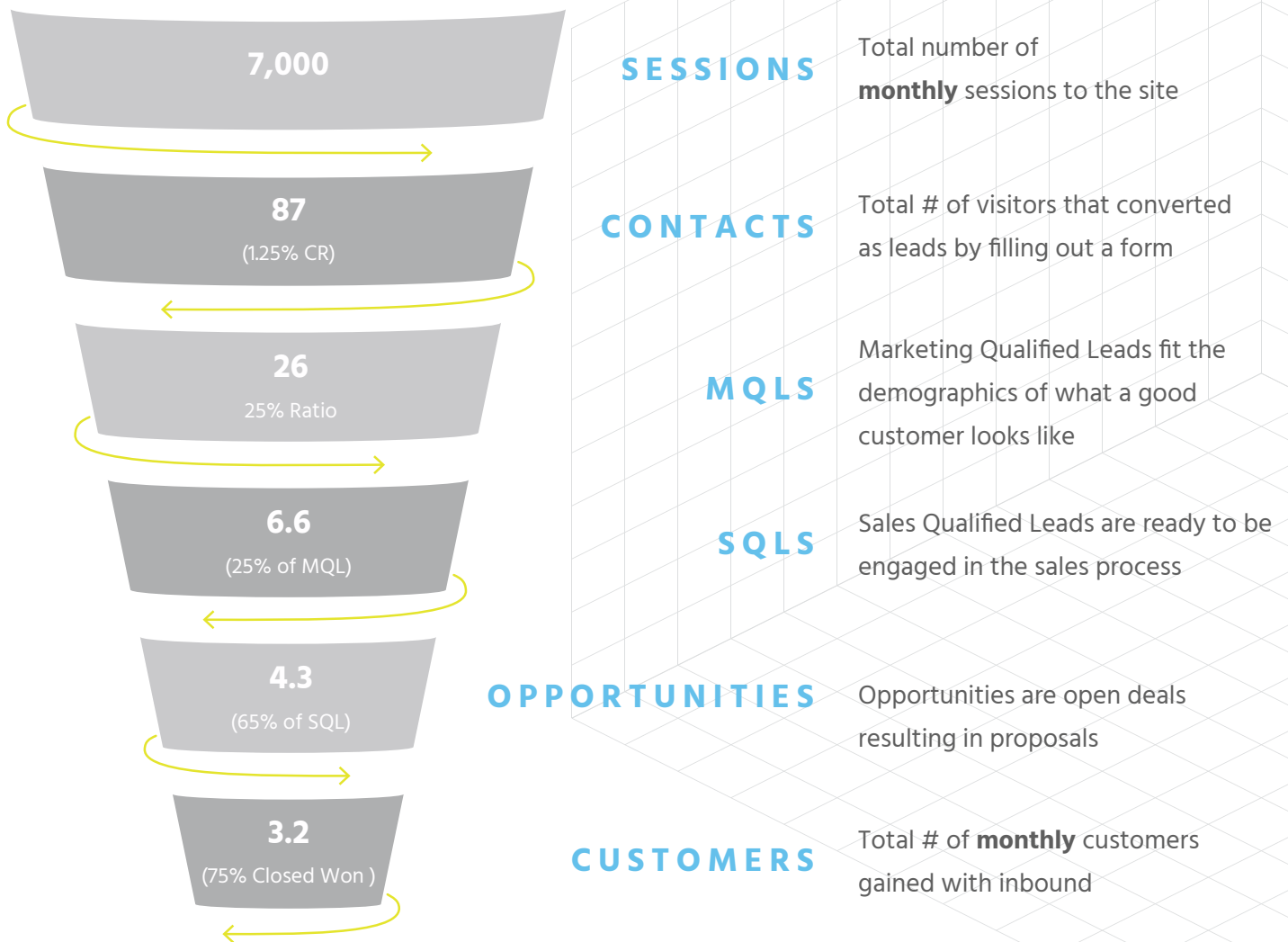
CUSTOMERS

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

BD FUNNEL: 12 MONTHS

Forecasted KPIs we expect from 12 months of ESOP Partners' new inbound marketing program, based on the proposed budget and division of roles between Weidert Group and ESOP Partners.

YEAR 1 GOALS



ESOP PARTNERS FLYWHEEL



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 (ESOP Partners' 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**
- Utilize targeted **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**

DELIGHT

- Gather and manage **customer feedback**
- **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**
- Adjust/optimize program as needed to make it even more powerful with data-driven decisions and **strategic 90-day roadmaps**



FOUNDATIONAL WORK

MARCH THROUGH MAY



INBOUND MARKETING PLAN & PLAYBOOK TIMELINE

MAR - MAY

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 background work we do prior to initiating your new program—your content strategy and action plan, your editorial calendar, your social media protocols.

RECOMMENDATION: 249 POINTS

Details for each recommended "chapter" found on pages 10-13

	ESOP PARTNERS & WG	ESOP PARTNERS	WG
WEEK 1	<ul style="list-style-type: none"> Kickoff meeting 	<ul style="list-style-type: none"> Customer interview contacts provided before call Start persona homework 	
WEEK 2		<ul style="list-style-type: none"> Persona homework completed 	<ul style="list-style-type: none"> Customer interviews begin SEO strategy work begins
WEEK 3-5	<ul style="list-style-type: none"> Persona workshop 		<ul style="list-style-type: none"> Persona development Competitive advantage & positioning (strategic brief) Messaging
WEEK 6	<ul style="list-style-type: none"> Progress presentation 	<ul style="list-style-type: none"> Content workshop homework completed 	<ul style="list-style-type: none"> Content strategy/ed cal Content promotion strategy Paid ad strategy
WEEK 7-11	<ul style="list-style-type: none"> Content & buyer journey workshop 		<ul style="list-style-type: none"> Lead qualification & marketing automation Lead management Customer feedback Reporting & KPIs
WEEK 12	<ul style="list-style-type: none"> Final presentation 		



ESOP PARTNERS INBOUND PLAN & PLAYBOOK

22 POINTS

KICKOFF MEETING

The 2-hour kickoff meeting will be conducted via Zoom video conference. Contacts for customer interviews to be provided to Weidert Group for review before the meeting.

18 POINTS

CUSTOMER INTERVIEWS

Interviews with customers help us understand the buyer journey, needs, thought processes, their view of ESOP Partners' value proposition, objections, what they think are pros and cons of their decision to work with ESOP Partners, etc. We'll use this information to articulate ESOP Partners' competitive advantage and positioning and create content that addresses prospects' needs and aligns with their "states of mind" related to your products and services. Includes 4-6 phone interviews.

26 POINTS

SEO CONTENT STRATEGY

For organic search results to put ESOP Partners "above the fold," we first need to know what our prospects are/will be searching for, then create valuable content that incorporates these terms naturally. This section outlines what we found through in-depth SEO research (as part of the website development project) and what we recommend for ESOP Partners' ongoing SEO Strategy. The findings will drive our future content and editorial calendars. Website/SEO scoping meeting is a pre-requisite for SEO content strategy work to begin. Complete SEO research and strategy includes:

Summary of keyword insights for editorial planning and quick-win opportunities

- Compilation of keyword strategy & topic clusters
- List of initial inbound link building opportunities
- Strategy for ongoing link building
- Off-page SEO opportunities
- Summary of keyword insights for editorial planning

16 POINTS

COMPETITIVE ADVANTAGE & POSITIONING

(STRATEGIC BRIEF)

From our interviews, review of existing marketing assets, and competitive review, we define what ESOP Partners 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 from internal interviews and the review of competitors, and adds insights into what we learned; outlines where the opportunities are and how we'll act on them.

ESOP PARTNERS INBOUND PLAN & PLAYBOOK

8 POINTS

MESSAGING

Based on all previous assets 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 ESOP Partners. These messages are foundational to all content (blogs and advanced content) and to social media.

26 POINTS

PERSONA WORKSHOP & DEVELOPMENT

Draws 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 ESOP Partners. Includes a 2-hour workshop via Zoom video conference.

23 POINTS

PROGRESS PRESENTATION

A 2-hour progress presentation will be scheduled to share the first half of the Playbook via Zoom video conference.

25 POINTS

CONTENT & BUYER JOURNEY WORKSHOP

To define the buyer's journey, we'll focus on how buyers become aware of, evaluate, and purchase your products and services. We'll want to understand what questions they're asking in order to determine how to be most helpful in each stage. For Marketing and Sales, that means creating content in terms of the buyer's journey, offering the right content at the right time, providing context to Sales to help them challenge prospects appropriately during the sales process, and asking the right questions in order to offer the most help and value. Includes a 90-minute workshop via Zoom.

10 POINTS

CONTENT STRATEGY & INITIAL 90-DAY EDITORIAL CALENDAR

The calendar outlines the content topics for blogs and advanced (gated) content, plus our plans for distribution. Topics are determined by what prospects want to know (based on their personas) and what we want to tell them; frequency is based on what we know about search engines (how crawlers evaluate the appropriateness of a site relative to what the prospect is searching for), and what we know about the power of frequent publication to attract more traffic and leads.

ESOP PARTNERS INBOUND PLAN & PLAYBOOK

CONTENT PROMOTION STRATEGY - SOCIAL MEDIA & PAID ADS

This section outlines the relative value of social media platforms for use as promotion tools for ESOP Partners' content, then outlines protocols for engagement. The recommended engagement is based on the prospects' likelihood to be on specific platforms and the types of issues/challenges they're experiencing.

It also outlines the strategy for paid ads. Paid ads can make ESOP Partners, its key content, and information about services near the top of the page for the keywords we bid on in the Google Search ad channel. These ads will also bring a lot of attention to and drive awareness of ESOP Partners in display-based ad channels like Google Display and LinkedIn. Here are tasks we'll complete in the research stage to ensure we run a well-targeted, optimized paid ad campaign:

- Research to see which keywords would drive the most engagement, and ultimately, clicks
- Industry research of ESOP services and other relevant keywords in various markets to see how much a list of these themed keywords would cost in these markets, and to gauge what kind of ad budget to recommend
- Research of ESOP Partners' primary competitors to see which keywords rank for their sites
- Nationwide research with this same keyword set as above to get a broader picture of the competitive landscape
- Research ESOP Partners' primary competitors to see which keywords rank for their sites
- Begin assembling a list of relevant website placements and audiences to target with paid ads
- Compile recommendations for ad assets, ad spend, and ad mix

CUSTOMER FEEDBACK STRATEGY

Set the strategy for a more systematic way of gathering, tracking, and leveraging customer feedback to understand what your customers are thinking, delight them, and turn promoters into marketing assets with HubSpot's customer feedback tools. Includes a customer journey map to determine triggers for customer satisfaction surveys.

14 POINTS

12 POINTS

ESOP PARTNERS INBOUND PLAN & PLAYBOOK

12 POINTS

LEAD QUALIFICATION, LEAD SCORING & MKTG AUTOMATION REVIEW + 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 and live chat/chatbot conversations. This will help ensure that we're keeping leads engaged with content that moves them further along in their buyer journeys. Nurturing communicates 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.

8 POINTS

LEAD MANAGEMENT (SALES) STRATEGY

You've nurtured your leads to sales-readiness – now what? Developing a plan for lead management is critical to turn your inbound leads into customers. We'll help you develop a Marketing-to-Sales process and outline the commitments of all parties to take specific actions to close deals. Includes:

- Lead management and handoff recommendations
- Protocols for tracking sales opportunities using HubSpot CRM deal pipeline

6 POINTS

REPORTING & KPI STRATEGY

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

23 POINTS

FINAL PRESENTATION

A 90-minute final presentation will be scheduled to share the final Playbook via Zoom video conference.

PURPOSE: Once your Playbook strategy is set, we'll complete the following set-up items.

12 POINTS

ADVANCED CONTENT TEMPLATE DESIGN

- Creation of advanced content template to match new sales collateral design

12 POINTS

MARKETING AUTOMATION INITIAL SET-UP

- Set-up of basic automation per recommendations in the Plan & Playbook

6 POINTS

REPORTING DATABOARDS SETUP (DATABOX)

- Creation of custom Databoards (up to 3) for real-time reporting per recommendations in the Plan & Playbook

10 POINTS

HUBSPOT CUSTOMER SATISFACTION SURVEYS SET-UP

- Creation of surveys per recommendations in the Plan & Playbook
- Setup of tracking spreadsheet
- Setup of workflows for detractors, passives and promoters per recommendations in the Plan & Playbook

35 POINTS

PAID ADS SET-UP

- Paid ad account set-up for Google ads and LinkedIn includes copywriting, display ad creation, reporting set-up, and ad launch

PURPOSE: Hit the ground running! While we're preparing the Inbound Plan & Playbook, we'll kickstart content development and paid advertising.

45 POINTS

KICKSTART CAMPAIGN FOR REFERRAL TARGETS

Create an initial gated content offer that will be valuable to your "referral" target persona; in exchange they'll provide their contact information to start building your contact database.

- Write and design (1) 5-8 page eBook
- Develop corresponding conversion form, landing page (1), graphic CTA button (1), and email promotion (1)
- Create basic live chat and/or chatbot on site for immediate conversion opportunities

2 PT/MO + \$1K/MO AD SPEND

PAID ADVERTISING/PPC

Recommending monthly management (optimization, ongoing ad creation, graphics, and reporting) for Google Search ads only during the foundational phase. These ads will produce instant relevant traffic and leads from the moment they're turned on and can be optimized as we begin to gather ad data.

25 POINTS

OPTIMIZED BLOGS

Five previously-published blog articles will be identified and optimized based on their ability to be slightly updated with an improved keyword-rich headline, SEO improvements in the body of the article for better results that appeal to both search engines and prospects, and conversion optimization improvements.

- SEO research and write needed blog updates
- Write improved meta descriptions and social media lead-ins
- Re-format and re-publish in HubSpot with a new date stamp and SEO-optimized URL

20 POINTS

TOP 5 ENTRANCE PAGE OPTIMIZATION

A bucket of 20 points will be reserved for conversion rate optimization of ESOP Partners' top 5 entrance pages. This will include determining the most relevant conversion offers (using existing content) and the best conversion method (in-line CTA button or text, slide-in CTA, exit intent CTA, smart CTAs, etc.). The goal is to make an instant impact to boost ESOP Partners' current low Views-to-Contacts conversion rate.



PURPOSE: Hit the ground running! While we're preparing the Inbound Plan & Playbook, we'll kickstart content development and paid advertising.

HUBSPOT DATA MAINTENANCE/CLEAN-UP

Manage the number of Marketing Contacts in your portal and maintain data integrity

- Data Health Assessment: a comprehensive report of any data issues from incorrect capitalization to contacts that haven't engaged in years that are clogging your portal
- Fix issues such as:
 - Merge duplicates
 - Eliminate hard bounces/bulk move to another list
 - Format first and last names
 - Format incorrect information

8 POINTS

LEAD FORENSICS DEMO FOR PROSPECTING

Ultimately if you target businesses that are viewing your website you'll generate more new business than if you just allow businesses to visit your website and leave. Lead Forensics' prospecting software will allow you the opportunity to identify those companies that visit your website without filling out a form. Price of this software depends on traffic volume.

N/A

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 status call every other week, starting 2 weeks after kickoff call, with agenda and call summaries, plus up to 26 points for program management and marketing support as needed.

Weidert Group

- Provide agenda and call summaries for each status call

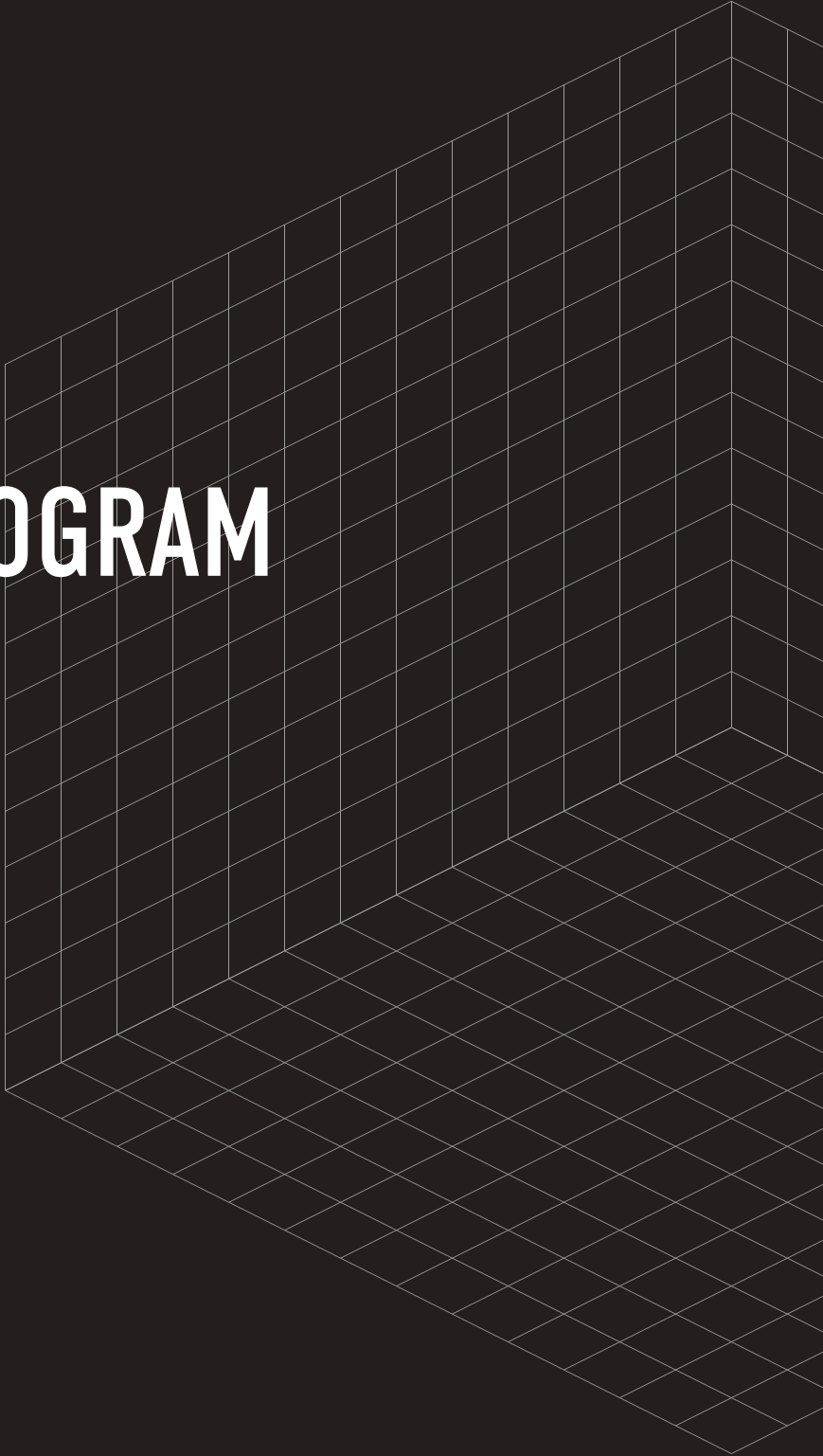
ESOP Partners

- Attend status calls every other week

54 POINTS

INBOUND MONTHLY PROGRAM

STARTS JUNE



MONTHLY INBOUND CORE PROGRAM

PURPOSE: The monthly core components are the foundation of the inbound program.

BLOG ARTICLES

ATTRACT

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 13 blogs/qtr, format and publish in HubSpot. Includes interviews w/ SMEs for half the blogs

ESOP Partners

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

CONTENT PROMOTION

ATTRACT

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 downloads content that you've got additional content they'll find useful

Social media management and execution for company branded profiles across social media channels.

Creation of monthly blog-in-review email.

Weidert Group

- Write social media lead-ins for all blogs and advanced content; share with ESOP Partners for publishing

ESOP Partners

- Regular posting by select team members on LinkedIn personal profiles (using provided lead-ins)
- Write and publish social media posts per agreed-upon strategy and schedule to company profiles
- Monitor social media channels
- Create and send monthly blog-in-review email newsletter

116 POINTS PER QUARTER

0 POINTS PER QUARTER

MONTHLY INBOUND CORE PROGRAM

18 POINTS PER QUARTER

SEO & WEBSITE OPTIMIZATION

ATTRACT

PURPOSE: Since SEO is not a one-time event and takes ongoing management to continually improve rankings and meaningful traffic, we recommend including ongoing SEO analysis and optimization as part of your monthly program:

- Address any website crawl errors or technical SEO issues and implement needed corrections
- Ongoing monitoring and reporting on SEO progress and new opportunities
- Ongoing on-page SEO updates and refinements based on keyword rankings data
- Maintain listing of ongoing link building opportunities and newly secured links

Weidert Group

- Ongoing SEO analysis and management includes continued improvements/corrections from SEO audit, ongoing corrections of search engine crawl errors/usability alerts from Google, recommendations for link outreach to high-potential websites, ongoing on-page SEO updates, etc.

ESOP Partners

- Complete link outreach to high-potential websites per Weidert Group's guidance

5 POINTS/MONTH, PLUS \$2,000 MONTHLY AD SPEND

PAID ADVERTISING/PPC

ATTRACT

PURPOSE: Paid ads can make ESOP Partners, its key content, and information about services visible near the top of the page for the keywords we bid on in the Google Search ad channel. These ads will also bring a lot of attention to and drive awareness of ESOP Partners in display-based ad channels like Google Display and LinkedIn.

A \$2,000 monthly budget for PPC search and display ads, executing on the recommendations in ESOP Partners' Marketing Playbook, is recommended. Suggesting monthly management (optimization, ongoing ad creation, graphics and reporting) for:

- Google search and display
- LinkedIn

Weidert Group

- Create ads and manage campaigns

ESOP Partners

- Review and approve ads

MONTHLY INBOUND CORE PROGRAM

66 POINTS PER QUARTER

TARGET-SPECIFIC ADVANCED (GATED) CONTENT

ENGAGE

PURPOSE: The more advanced content (infographics, eBooks, case studies, tip sheets, 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) 5-8 page advanced content piece and (1) 2-4 page advanced content piece, with content support landing page, thank you page, email and CTA graphic for each. Weidert Group will send the promotional email for the content pieces in HubSpot.

ESOP Partners

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

0 POINTS PER QUARTER

CUSTOMER FEEDBACK

DELIGHT

PURPOSE: Provide customer feedback notifications and reporting as outlined in ESOP Partners' Inbound Marketing Plan & Playbook.

Customer feedback surveys will be created and automated notifications will be set up during foundational phase. Customer feedback summary reports to be provided monthly.

ESOP Partners

- Prepare monthly customer feedback summary report with template provided by Weidert Group as part of the Plan & Playbook development; Develop action plan for customer feedback, engage with promoters

MONTHLY INBOUND CORE PROGRAM

27 POINTS PER QUARTER

90-DAY ROADMAPPING

TRACK, ANALYZE & ADJUST

(INCLUDES 90-DAY EDITORIAL CALENDAR)

PURPOSE: Every 90 days we quickly 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 90 days is very similar; other times we're taking 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 90-day roadmap recommendations based on data, including editorial calendar for content creation and publishing (blog/vlog, advanced content, and video content)

ESOP Partners

- Attend roadmap meeting; approve 90-day roadmap for next quarter

54 POINTS PER QUARTER

LEVEL 2 MTGS & MARKETING SUPPORT

TRACK, ANALYZE & ADJUST

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 up to 26 points each quarter for program management and marketing support as needed. Also includes access to Databox data walls for 24/7 reporting.

Weidert Group

- Provide agenda and call summaries for each status call

ESOP Partners

- Attend status calls every other week

INBOUND **FLEX** PROGRAM

PURPOSE: The monthly flex budget is set aside for additional services from Weidert Group as needed. These services may include but are not limited to:

RECOMMENDATION: BUDGET FOR 60 POINTS FOR FLEX EACH QUARTER

TECHNICAL BLOGS

- Technical blog, 8 POINTS
- Technical blog, with interview, 10 POINTS
- Technical blog, copy only, 6 POINTS

ADDITIONAL OPTIMIZED BLOGS

- Optimized blog, 5 POINTS

TARGET-SPECIFIC ADVANCED CONTENT

- 2-4 page content piece, 15 POINTS
- 5-8 page content piece, 27 POINTS
- Infographic, 29 POINTS
- Content support set (landing pg, thank you pg, email and CTA graphic), 12 POINTS
- Press release, including distribution, 6 POINTS

LEAD NURTURING

- Workflow plan & set up utilizing 4-8 existing emails, 12 POINTS

VIDEO & SALES COLLATERAL SUPPORT

- TBD

WEBINAR SUPPORT

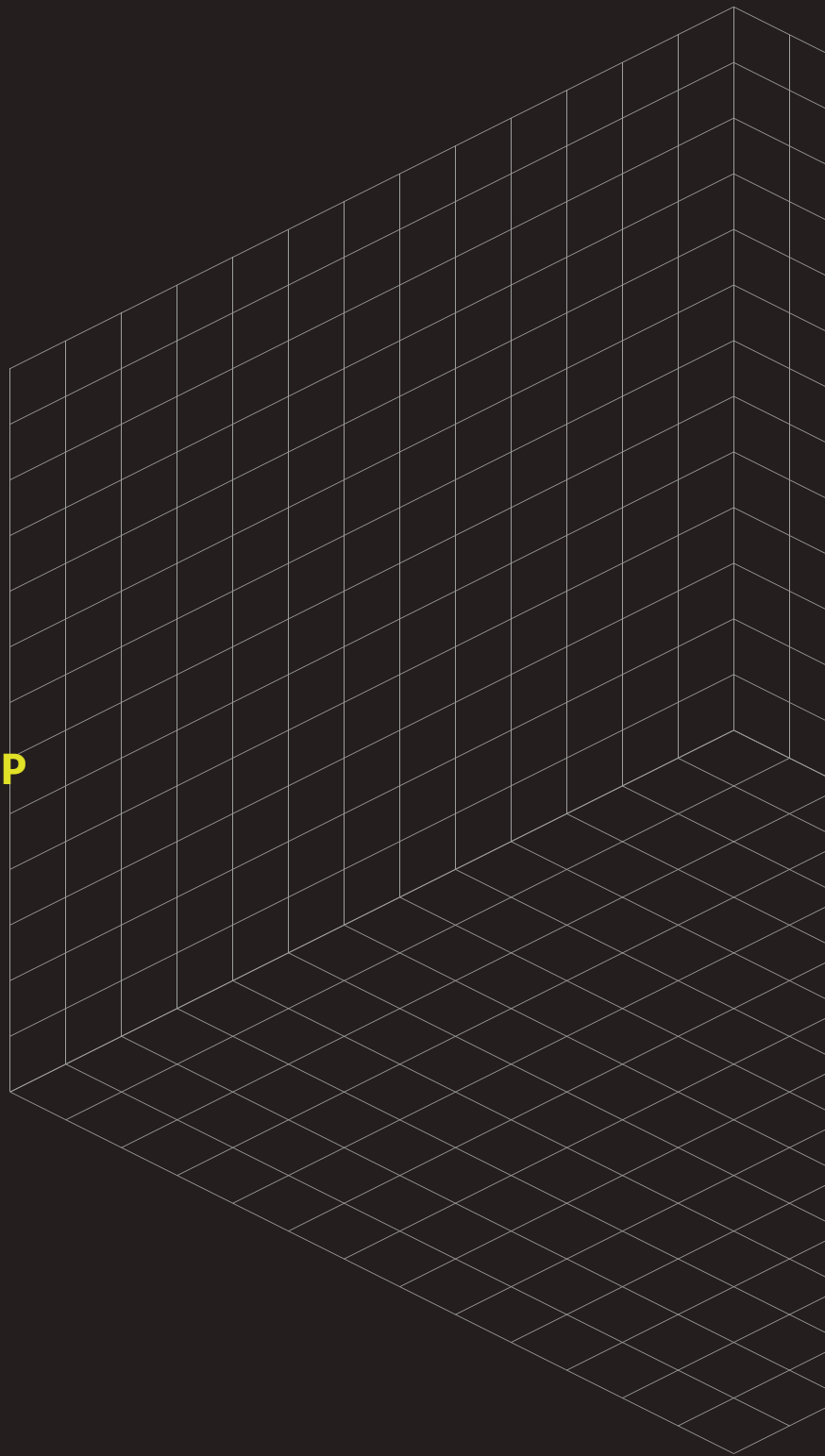
- TBD

WEBSITE DEVELOPMENT & ADDITIONAL OPTIMIZATION PROJECTS

- TBD

ABOUT US

WEIDERT GROUP



YOUR TEAM

ACHIEVEMENTS

- We've been a HubSpot partner for more than 9 years, and we practice all that we preach
- We reached Gold Partner level in 2012; Platinum in 2015
- We reached Diamond level status in 2020 – one of only 32 in the U.S.
- We won HubSpot Impact award (4th qtr) January 2020 for top website project in North America

THE TEAM

- 32 full-time, in-house employees. We reached Gold Partner level in 2012; Platinum in 2015
- Employee-owned company since March 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 32 employees 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:



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:
- Attract our best prospects to our website
 - Provides relevant content that helps them progress in their buyer journey
 - Demonstrates our expertise

1,248 →

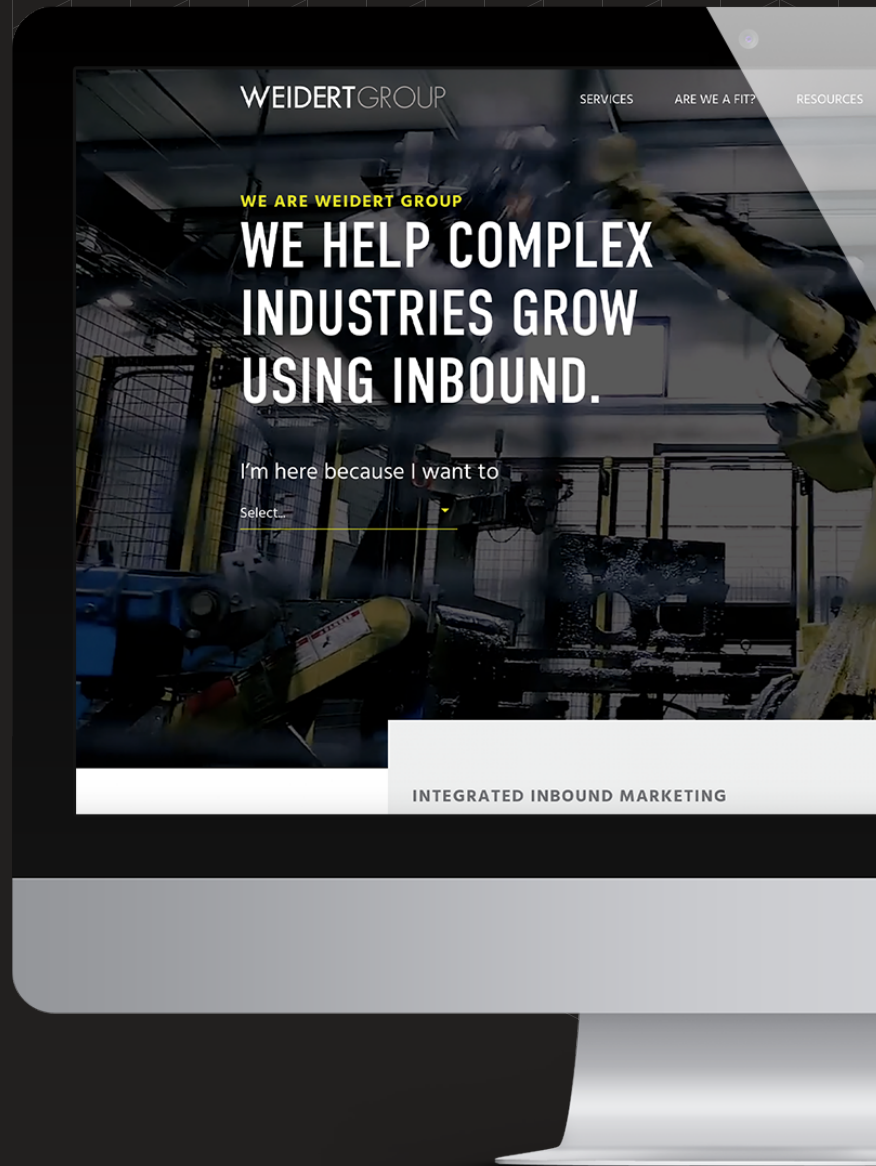
60k TOTAL TRAFFIC

290 →

55k ORGANIC TRAFFIC

11 →

500 LEADS



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 10 months after site launch:

407 NEW MQLS

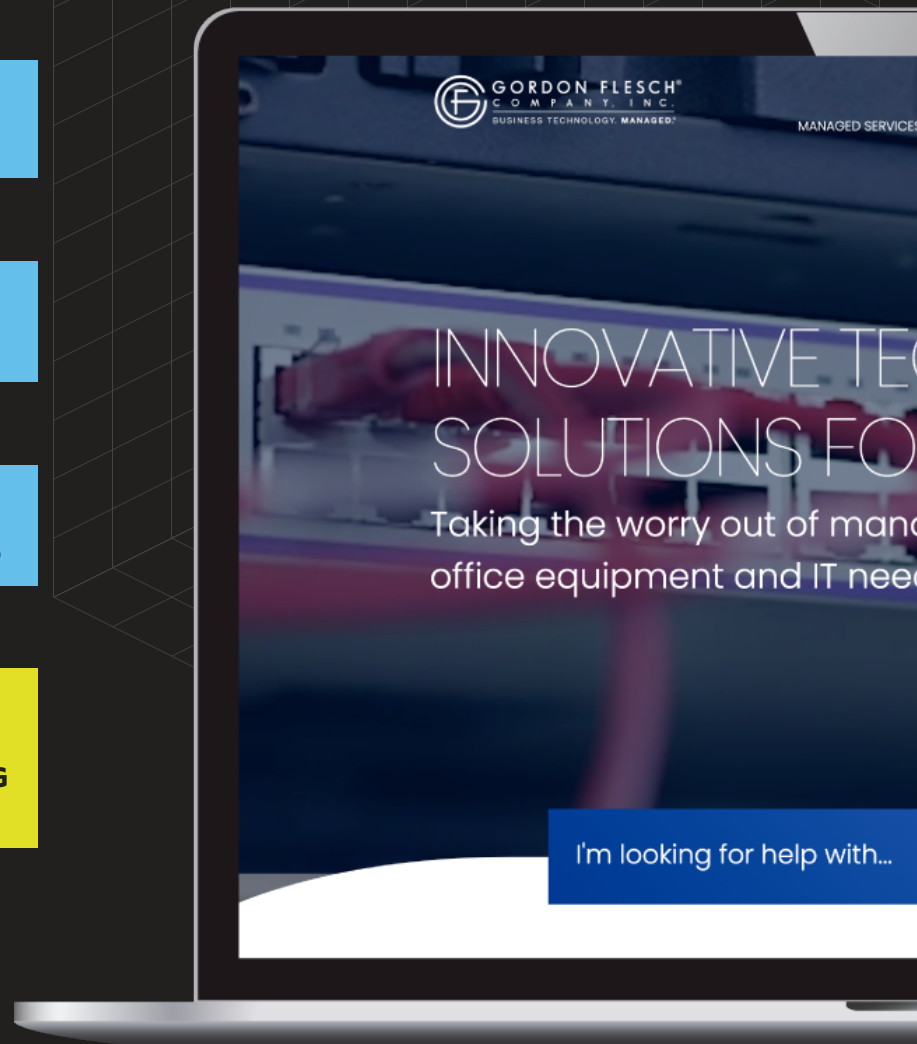
100 NEW SQLS
IN 5 MONTHS

\$349k NEW SQLS
IN 5 MONTHS

\$930k IN NEW
REVENUE FROM
NEW & EXISTING
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



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

Clutch Firms that deliver

ADVERTISING & MARKETING | WEB & SOFTWARE DEVELOPMENT | MOBILE APP DEVELOPMENT | IT SERVICES & SOLUTIONS

Digital Marketing Agencies, Search Engine Marketing Agencies, Social Media Marketing Agencies

Weidert Group

B2B Inbound Marketing Agency

W Weidert Group is a B2B inbound marketing agency based in Appleton, Wisconsin. A certified HubSpot partner since 2011, Weidert Group achieved Platinum-level partner status with HubSpot in 2015. HubSpot is the leading marketing automation and sales software, with over 11,000 customers in 70 countries. Weidert Group is a full-service agency providing all components of an inbound marketing and sales effort: website and content strategy and development, search engine optimization (SEO), social management, lead nurturing, sales enablement services, and overall marketing management.

Clients represent B2B companies in industrial manufacturing, insurance & services, industrial A/E/C, and industrial distribution—in addition to software service companies supporting these industries.

Want to supercharge your sales funnel? We'd be happy to demonstrate the inbound marketing to attract qualified leads and turn them into customer out our endless inbound marketing resources at www.weidert.com/resources

Key clients:
Sentry Equipment • Marion Body Works • Wipfli • CUNA Mutual Group • U. Properties • Crane Engineering • Gravie • Fisher Tank Company

Certifications:
Platinum HubSpot Partner since 2011

Certifications by HubSpot:

- All staff are HubSpot Software Certified & Inbound Marketing Certified
- HubSpot COS Design Certification (2014 - present)
- HubSpot COS Design Certification (2014 - present)
- All staff are HubSpot software certified & inbound marketing certified

Rating: 4.6 (4 reviews)

Visit Website

Founded: 1980

Employees: 10 - 49

Address: Weidert Group, 901 S. Lawe St., Appleton, WI 54915

Web Design & Inbound Marketing for Food Seller

Digital marketing | \$50,000 to \$199,999 | Aug 3, 2016

Project summary:
The Weidert Group was hired to create an inbound marketing strategy and website redesign for the client. They provided content creation for both their blogs and their social media.

Feedback summary:
Since the website was redesigned, the client is seeing two and a half times the amount of site views than they were before working with The Weidert Group. They enjoyed the constant communication The Weidert Group provided.

"The Weidert Group is very good in terms of consistent communication. I would say that I hear from them a couple of times a week on average."

— *President, AK Pizza Crust (Food Seller)*

+ Full review

Inbound Marketing for Electronics Provider

Digital marketing | \$200,000 to \$999,999 | Aug 2, 2016

Project summary:
The Weidert Group was hired to implement Hubspot and provide content marketing services. They managed the client's social media and blog while creating content for both.

Feedback summary:
Due to the work The Weidert Group did, the client has seen a 14% increase in website visits and a dramatic increase of conversion rates at each stage of the funnel. The Weidert Group's project management was always on point and the quality of work was always very high.

"The Weidert Group's quality of work is always really high. The creativity they provide, in how we can modify things to improve, has all been great and proactive."

— *Senior VP, Dfr Solutions (Electronics Provider)*

+ Full review

President at AK Pizza Crust

201-500 employees
Green Bay, Wisconsin

Overall rating: ★★★★★
Quality: ★★★★★
Schedule: ★★★★★
Cost: ★★★★★
Willing to refer: ★★★★★

Senior VP at Dfr Solutions

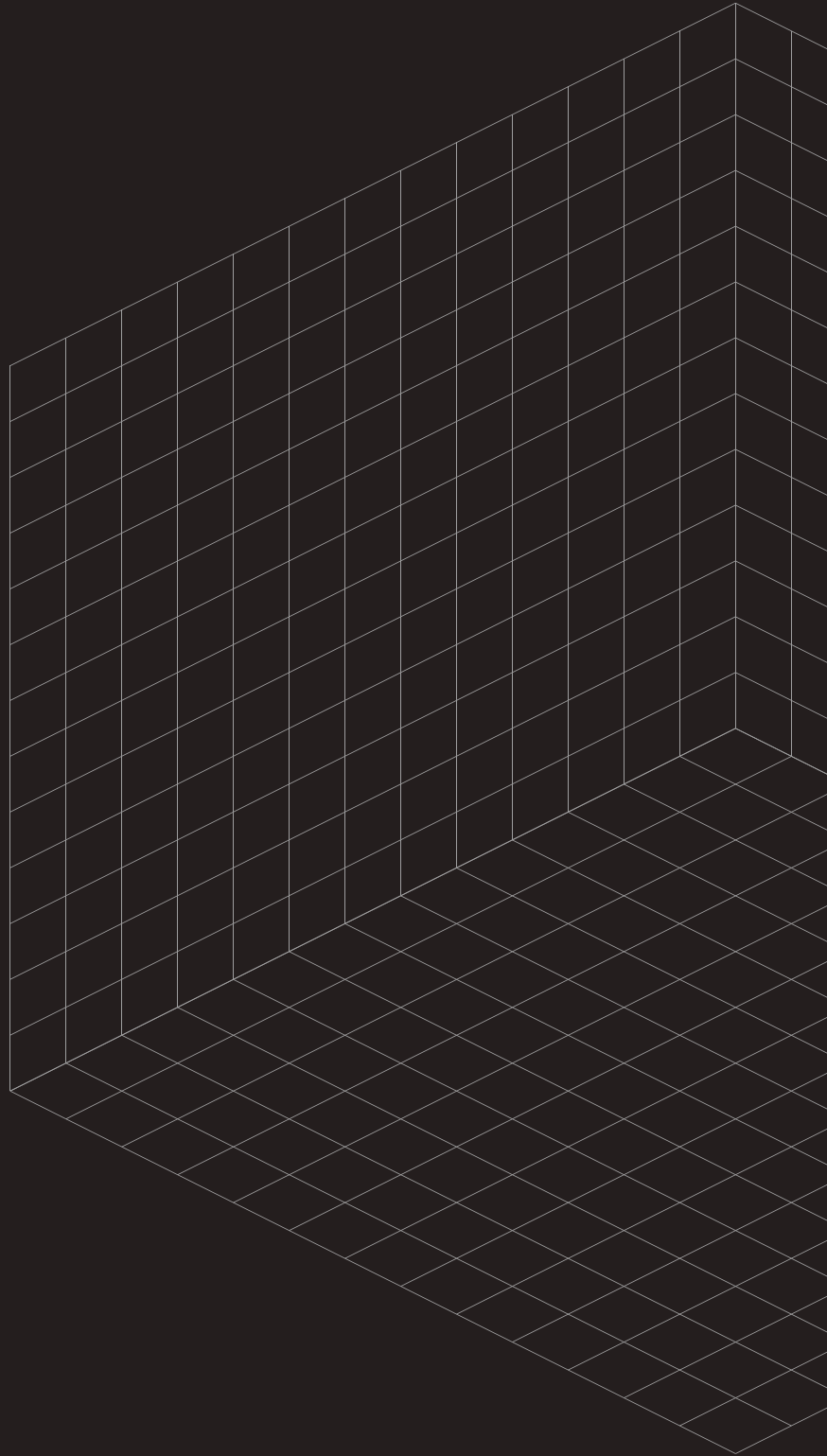
11-50 employees
Baltimore, Maryland

Overall rating: ★★★★★
Quality: ★★★★★
Schedule: ★★★★★
Cost: ★★★★★
Willing to refer: ★★★★★

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



AGREEMENT

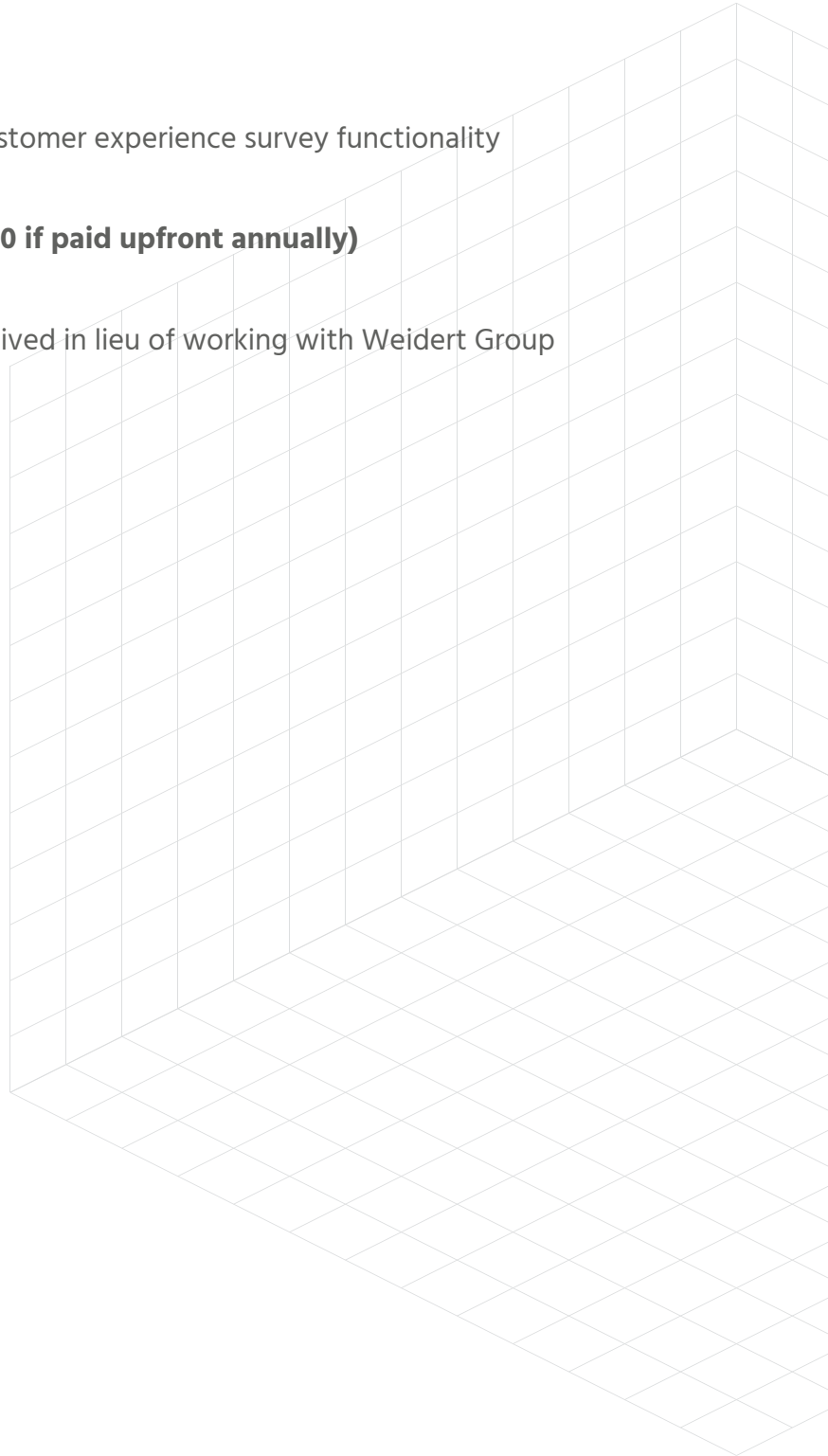


TECHNOLOGY BUDGET

HUBSPOT SERVICE HUB PRO

- Includes functionality for NPS & customer experience survey functionality
- **Total: \$400/month (list price, \$360 if paid upfront annually)**

Note: HubSpot's on-boarding cost waived in lieu of working with Weidert Group



FOUNDATIONAL BUDGET

ESOP PARTNERS PRICE PER POINT: \$125

MARCH - MAY 2021



ESOP PARTNERS 2021 Foundational (March-May) Roadmap Planning Workbook

FOCUS AREA 1: INBOUND PLAN & PLAYBOOK

Service Type	Quantity	Points	Total Points	\$ Cost
Program Kickoff Call	1	22	22	\$2,750
Customer Interviews	1	18	18	\$2,250
SEO Content Strategy	1	26	26	\$3,250
Competitive Advantage & Positioning	1	16	16	\$2,000
Messaging	1	8	8	\$1,000
Persona Workshop & Development	1	26	26	\$3,250
Progress presentation	1	23	23	\$2,875
Content Workshop	1	25	25	\$3,125
Content Strategy & First 90-Day Editorial Calendar	1	10	10	\$1,250
Content Promotion Strategy	1	14	14	\$1,750
Customer Feedback Strategy	1	12	12	\$1,500
Initial Lead Qualification Strategy and Marketing Automation Strategy	1	12	12	\$1,500
Lead Management (Sales) Strategy	1	8	8	\$1,000
Reporting & KPI Strategy	1	6	6	\$750
Final Presentation of Playbook	1	23	23	\$2,875
Subtotal			249	\$31,125

FOCUS AREA 2: FOUNDATIONAL SET-UP

Service Type	Quantity	Points	Total Points	\$ Cost
Advanced Content Template Design	1	12	12	\$1,500
Marketing Automation Initial Set-Up	1	12	12	\$1,500
Reporting Databoards Set-Up	1	6	6	\$750
HubSpot Customer Satisfaction Surveys Set-Up	1	10	10	\$1,250
Paid Ads Set-up	1	35	35	\$4,375
Subtotal			75	\$9,375

FOCUS AREA 3: KICKSTARTERS

Service Type	Quantity	Points	Total Points	\$ Cost
Kickstart Campaign	1	45	45	\$5,625
Paid Ads Campaign (does not include paid ad spend)	2	2	4	\$500
Optimized Blogs	5	5	25	\$3,125
Top 5 Entrance Page Optimization	1	20	20	\$2,500
HubSpot Data Maintenance/Clean-Up	1	8	8	\$1,000
Lead Forensics Demo	1	0	0	\$0
Subtotal			102	\$12,750

FOCUS AREA 4: LEVEL 2 MTGS & SUPPORT

Service	Quantity	Points	Total Points	\$ Cost
Strategy: Level 2 Meetings & Marketing Support	1	54	54	\$6,750
Subtotal			54	\$6,750

TOTALS

Proposed Roadmap Program Total				\$60,000
TOTALS			480	\$60,000

- **\$60,000 to be split billed evenly** between months March - May (\$20,000 per month)
- **Does not include** \$1,000 monthly ad spend (April & May) or WI taxes for paid advertising creative



JUN - AUG ROADMAP BUDGET

JUNE - AUG 2021

ESOP PARTNERS PRICE PER POINT: \$125



ESOP PARTNERS 2021 June-Aug Roadmap Planning Workbook

FOCUS AREA 1: ATTRACT QUALIFIED TRAFFIC

Service Type	Quantity	Points	Total Points	\$ Cost
Content : Blog Article - Technical	7	8	56	\$7,000.00
Content : Blog Article - Technical, w/ Interview	6	10	60	\$7,500.00
SEO & Website Optimization/Management	3	6	18	\$2,250.00
Monthly Paid Ads Management (<i>does not include ad spend</i>)	3	5	15	\$1,875.00
Subtotal			149	\$18,625

FOCUS AREA 2: ENGAGE/CONVERT

Service Type	Quantity	Points	Total Points	\$ Cost
Content : Advanced: 5-8 Pages	1	27	27	\$3,375.00
Content : Advanced: 2-4 Pages	1	15	15	\$1,875.00
Content Support : Email, LP, TY, CTA	2	12	24	\$3,000.00
Subtotal			66	\$8,250

FOCUS AREA 3: DELIGHT CUSTOMERS

Service Type	Quantity	Points	Total Points	\$ Cost
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FOCUS AREA 4: PROGRAM SUPPORT & STRATEGY (TRACK/ANALYZE/ADJUST)

Service	Quantity	Points	Total Points	\$ Cost
90-Day Roadmap and Editorial Calendar	1	27	27	\$3,375.00
Strategy: Level 2 Meetings & Marketing Support	1	54	54	\$6,750.00
Subtotal			81	\$10,125

FOCUS AREA 5: FLEX BUDGET

Service	Quantity	Points	Total Points	\$ Cost
TBD	1	60	60	\$7,500.00
Subtotal			60	\$7,500

TOTALS

Proposed Roadmap Program Total				
TOTALS			356	\$44,500

- **\$44,500 to be split billed evenly** between months June-Aug (\$14,834 per month)
- **Does not include** \$2,000 per month ad spend and WI sales tax for ad design



TERMS & CONDITIONS

- 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. 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 BE READY TO START!

1

Review proposal and provide feedback

2

Sign Weidert Group formal roadmap quotes for foundational period (to be provided by Chelsea once proposal is finalized)

3

Schedule the Kickoff Meeting and Workshops!

4

Secure HubSpot Service Hub license

**THE CONTENTS OF THIS PROPOSAL
ARE CONFIDENTIAL AND PROTECTED
BY COPYRIGHT.**

