



# SENIOR MARKET SALES

GROWTH WITH INBOUND



# MARKETING GOAL

It's the shared goal of SMS and Weidert Group to develop an inbound marketing and sales program that produces the quantity and quality of leads needed to support growth goals:

- Grow revenue by 20% YOY for the next 3 years
- Accelerate attraction of new agents/members
- Re-engage with agents/members not producing and/or taking advantage of the full breadth of SMS services
- Be recognized as the premier provider of health and wealth products and services to potential members

# GROWTH WITH INBOUND

The recommended growth strategy for SMS starts with a strategic foundational period and redesigned website, followed by 90-day roadmaps to build and continuously improve upon a custom inbound program.

1

## SET THE INBOUND STRATEGY

Develop the Playbook for the SMS inbound program, strategize, and set-up foundational items

**TIMELINE: October - February**

2

## WEBSITE REDESIGN

Redesign and optimize [seniormarketsales.com](https://seniormarketsales.com) for inbound

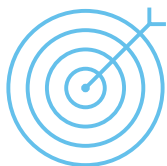
**TIMELINE: November - March**

3

## LAUNCH SITE & INITIATE THE CORE PROGRAM

Attract, engage, and delight leads and clients for SMS; continuous improvement and optimization

**TIMELINE: Starts March**



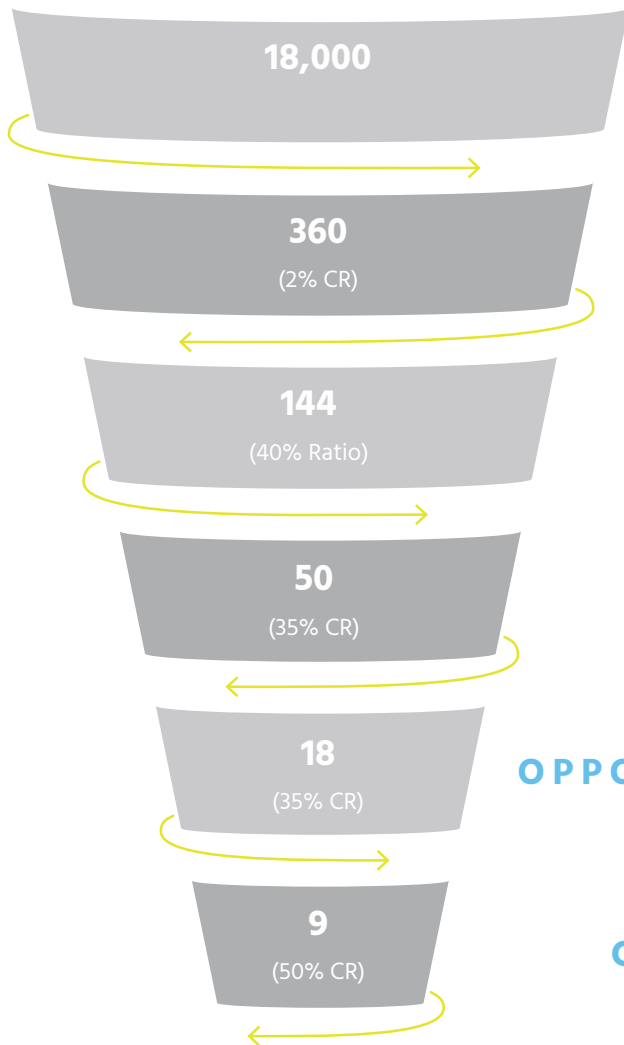
## WEIDERT GROUP'S PROMISE:

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

# BD FUNNEL & KPIs

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

## EXAMPLE FUNNEL METRICS



**SESSIONS**

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

**CONTACTS**

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

**SQLS**

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

**CUSTOMERS**

Total # of **monthly** agents/ members gained with inbound

# SMS 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 (SMS' 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**

### 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

OCTOBER THROUGH FEBRUARY



# INBOUND MARKETING PLAN & PLAYBOOK TIMELINE

OCT - JAN

**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, and more.

**RECOMMENDATION: 272 POINTS**

Details for each recommended "chapter" found on pages 8-13

	SMS & WEIDERT GROUP	SMS	WEIDERT GROUP
WEEK 1	<ul style="list-style-type: none"> <li>Kickoff meeting</li> </ul>	<ul style="list-style-type: none"> <li>Customer interview contacts provided before call</li> <li>Start persona homework</li> </ul>	
WEEK 2		<ul style="list-style-type: none"> <li>Persona homework completed</li> </ul>	<ul style="list-style-type: none"> <li>Customer interviews begin</li> <li>SEO strategy work begins</li> </ul>
WEEKS 3 - 8	<ul style="list-style-type: none"> <li>Persona workshop</li> </ul>		<ul style="list-style-type: none"> <li>Persona development</li> <li>Competitive advantage &amp; positioning (strategic brief)</li> <li>Messaging</li> </ul>
WEEKS 9	<ul style="list-style-type: none"> <li>Progress presentation</li> </ul>	<ul style="list-style-type: none"> <li>Content workshop homework completed</li> </ul>	<ul style="list-style-type: none"> <li>Content audit, strategy/ed cal</li> <li>Content promotion strategy</li> <li>Paid ad strategy</li> </ul>
WEEKS 10 - 16	<ul style="list-style-type: none"> <li>Content &amp; buyer journey workshop</li> </ul>		<ul style="list-style-type: none"> <li>Lead qualification &amp; marketing automation</li> <li>Lead management</li> <li>CRM management strategy</li> <li>Reporting &amp; KPIs</li> </ul>
WEEK 17	<ul style="list-style-type: none"> <li>Final presentation</li> </ul>		



# SMS INBOUND PLAN & PLAYBOOK

## KICKOFF & INTERNAL MEETINGS – 34 POINTS

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. Two hours of internal discovery calls also included.

## CUSTOMER INTERVIEWS – 18 POINTS

Interviews with customers help us understand the buyer journey, needs, thought processes, their view of SMS' value proposition, objections, what they think are pros and cons of their decision to work with SMS, etc. We'll use this information to articulate SMS' 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.

## SEO CONTENT STRATEGY – 26 POINTS

For organic search results to put SMS "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 (in conjunction with SEO work as part of the website development project) and what we recommend for SMS' ongoing SEO strategy. The findings will drive our future content and editorial calendars. Website/SEO scoping meeting is a prerequisite 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



# SMS INBOUND PLAN & PLAYBOOK

## PERSONA WORKSHOP & DEVELOPMENT – 26 POINTS

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 SMS. Conducted via 2-hour Zoom video conference.

## COMPETITIVE ADVANTAGE & POSITIONING – 8 POINTS

### (STRATEGIC BRIEF)

From our interviews, review of existing marketing assets, and competitive review, we define what SMS 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.

## MESSAGING – 8 POINTS

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 SMS. These messages are foundational to all content (blogs and advanced content) and to social media.

# SMS INBOUND PLAN & PLAYBOOK

## PROGRESS PRESENTATION – 24 POINTS

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

## CONTENT & BUYER JOURNEY WORKSHOP – 25 POINTS

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. Conducted via 90-minute Zoom video conference.

## CONTENT INVENTORY & AUDIT – 20 POINTS

The content audit utilizes analytics tools to evaluate blog article and advanced content performance based on views, conversions, number of keywords ranking for, minimum keyword ranking (your best position in search results), engagement, and bounce rate over a 1-year period. We'll prepare an audit and content tracking/inventory spreadsheet to make recommendations on appropriate actions for each content piece:

- **Remove:** Includes articles that are duplicates/redundant, promote past events, or highlight discontinued products. It's recommended these articles be redirected based on topic tags to a pillar page or another article that is performing well
- **Improve:** We'll identify at least 15 articles that could be technically optimized to improve performance for quick wins, identify high performing blogs that could be linked to and from pillar pages, remove dates from headings and urls, and analyze and improve CTAs on high traffic but low conversion rates
- **Consolidate:** We'll identify articles that have weak results and may be combined into a longer article with more depth
- **Keep:** Includes articles published in the last year and/or historical articles with decent keyword ranking performance. For these articles we will also define if the content is Awareness, Consideration, or Decision level

The content audit will provide insight on how to improve content strategy in future roadmaps: new pillar pages, linking older articles to new ones, backlink opportunities, use of campaigns, etc.

# SMS INBOUND PLAN & PLAYBOOK

## 90-DAY EDITORIAL CALENDAR – 10 POINTS

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.

## CONTENT PROMOTION STRATEGY - SOCIAL MEDIA & PAID ADS – 14 POINTS

This section outlines the relative value of social media platforms for use as promotion tools for SMS' 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 help SMS (and information about its services) rank at or near the top of the page for the keywords we bid on in the Google Search channel. They also help achieve wide exposure in image-based ad channels such as LinkedIn, Google Display, and Facebook.

For a seamless launch of your paid ads, this research phase includes:

- Research to see which keywords would drive the most engagement, and ultimately, clicks
- Industry research of SMS products and services and other relevant keywords in various markets
- Research of SMS' primary competitors to see which keywords rank for their sites
- Development of a list of relevant website placements and audiences to target with paid ads
- Recommendations for ad assets, ad spend, and ad mix

# SMS INBOUND PLAN & PLAYBOOK

## LEAD QUALIFICATION, LEAD SCORING & MKTG

### AUTOMATION: REVIEW + STRATEGY – 18 POINTS

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.

### LEAD MANAGEMENT (SALES) STRATEGY – 8 POINTS

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
- Lead management recommendations for Sales using HubSpot Sales tools
- Lead tracking recommendations for closed loop reporting from Marketing to Sales

### CRM MANAGEMENT STRATEGY FOR MKTG CONTACTS – 2 POINTS

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 and/or Databox.

# SMS INBOUND PLAN & PLAYBOOK

## REPORTING & KPI STRATEGY – 7 POINTS

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 during regular review calls. SMS' performance against industry benchmarks will be closely evaluated and will guide our recommended activity tweaks.

## FINAL PRESENTATION – 24 POINTS

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

# SET-UP & KICKSTARTERS TIMELINE

OCT - FEB

**PURPOSE:** Once your Playbook strategy is set, we'll complete the following set-up items to prepare for your ongoing inbound program. With our recommended kickstarters, you'll hit the ground running with a campaign that's ready to go when the new site goes live!

**RECOMMENDATION: 197 POINTS**

Details for each recommendation listed can be found on pages 15-17

	SMS & WEIDERT GROUP	SMS	WEIDERT GROUP
Starting WEEK 2	<ul style="list-style-type: none"> <li>• HubSpot portal setup</li> </ul>		
Starting WEEK 3	<ul style="list-style-type: none"> <li>• Permission pass email &amp; data cleanse</li> </ul>		
Starting WEEK 12			<ul style="list-style-type: none"> <li>• Content template design/creation (to match design of site)</li> </ul>
WEEKS 18-21  (once playbook is approved)			<ul style="list-style-type: none"> <li>• Marketing contacts maintenance set-up</li> <li>• Marketing automation initial set-up</li> <li>• Paid ads set-up</li> <li>• Reporting data boards set-up</li> <li>• Optimize blogs</li> <li>• Prepare site launch campaign</li> </ul>



# SMS FOUNDATIONAL SET-UP

**PURPOSE:** Once your Playbook strategy is set, we'll complete the following set-up items to prepare for your ongoing inbound program.

## HUBSPOT MKTG PORTAL SET-UP – 4 POINTS

- Direction and guidance on SMS set-up tasks (add users, account defaults, HubSpot tracking code install, filtering of internal IP addresses, connect social accounts, connect Ad accounts, hosted pages set-up, etc.)
- Import opt-out lists and any additional contacts outside of permission pass import
- Set up segmenting list
- Replace existing forms with HubSpot forms

## PERMISSION PASS EMAIL & DATA CLEANSE – 11 POINTS

- Permission pass email and list cleanse (for opt-in and clean up before contacts import)
- Contacts import (SMS to provide contacts in provided spreadsheet template for import)
  - Determine when and how contacts should be set as Marketing contacts
  - Determine if contacts should preemptively be set to Non-Marketing

## CONTENT TEMPLATE DESIGN – 18 POINTS

- Creation of advanced content template
- Creation of CTA template

## MARKETING CONTACTS MAINTENANCE SET-UP – 12 POINTS

- Based on strategy/needs in 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

# SMS FOUNDATIONAL SET-UP

**PURPOSE:** Once your Playbook strategy is set, we'll complete the following set-up items to prepare for your ongoing inbound program.

## MARKETING AUTOMATION INITIAL SET-UP – 30 POINTS

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

## PAID ADS SET-UP – 46 POINTS

- Paid ad account setup for Google Ads, LinkedIn Ads and Facebook Ads includes ad campaign setup, copywriting, ad graphics creation, reporting and notifications setups, and ads launch.

## REPORTING DATABOARDS SET-UP (DATABOX) – 6 POINTS

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



# SMS KICKSTARTERS

**PURPOSE:** Hit the ground running with a campaign that's ready to go when the new site goes live!

## KICKSTART CAMPAIGN – 45 POINTS

Create an initial gated content offer that will be valuable to a key target persona to be promoted when the new site goes live.

- 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 chatbot and/or pop-up on the website for immediate conversion opportunities

## OPTIMIZED BLOGS – 25 POINTS

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
- Reformat and republish in HubSpot with a new date stamp and SEO-optimized URL

# FOUNDATIONAL MKTG 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.

## LEVEL 2 MEETINGS & SUPPORT – 90 POINTS

**(1)** 30-minute status call every other week with agenda and call summaries, plus up to 43 points for program management and marketing support as needed.

### Weidert Group

- Provide agenda and call summaries for each status call

### SMS

- Attend status calls every other week



# WEBSITE REDESIGN

STARTS NOVEMBER



## WEBSITE ASSUMPTIONS

### PLATFORM

HubSpot

### STRATEGY

Strategic direction is critical to a successful website project. The following launchpad site proposal assumes the following strategic work has been completed in the Foundational Work phase prior to the build of the site:

- SEO
- Scoping
- Key messages, including approach & tone

### PAGE CONTENT

Stock photography and icons included; 32 pages of content to be written by Weidert Group.

### COMMUNICATION

A Google Drive folder will be shared with SMS' 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 SMS' main appointed contact to the assigned Weidert Group Consultant throughout the project. Client approval turnaround times vary based on website timelines, but should never take more than 5 business days.

### RESPONSIVENESS

The site will be mobile responsive.

## WEBSITE DELIVERABLES

### WHAT YOU'RE GETTING

- All-new website that is:
  - Optimized for Inbound potential
  - Optimized for User Experience (UX) using best practices
  - Optimized for SEO and the start of organic growth and paid campaigns
  - Nimble, easy to manage and update
  - Focused
- Revised messaging/tone/branding
  - In order to really capture your buyer persona's attention you need to align your messaging, tone, and branding with what resonates
- **Note: login areas (mySMS or LMS similar) considered to be phase 2 or future deliverable to be scoped separately**

# WEBSITE DEVELOPMENT PHASES

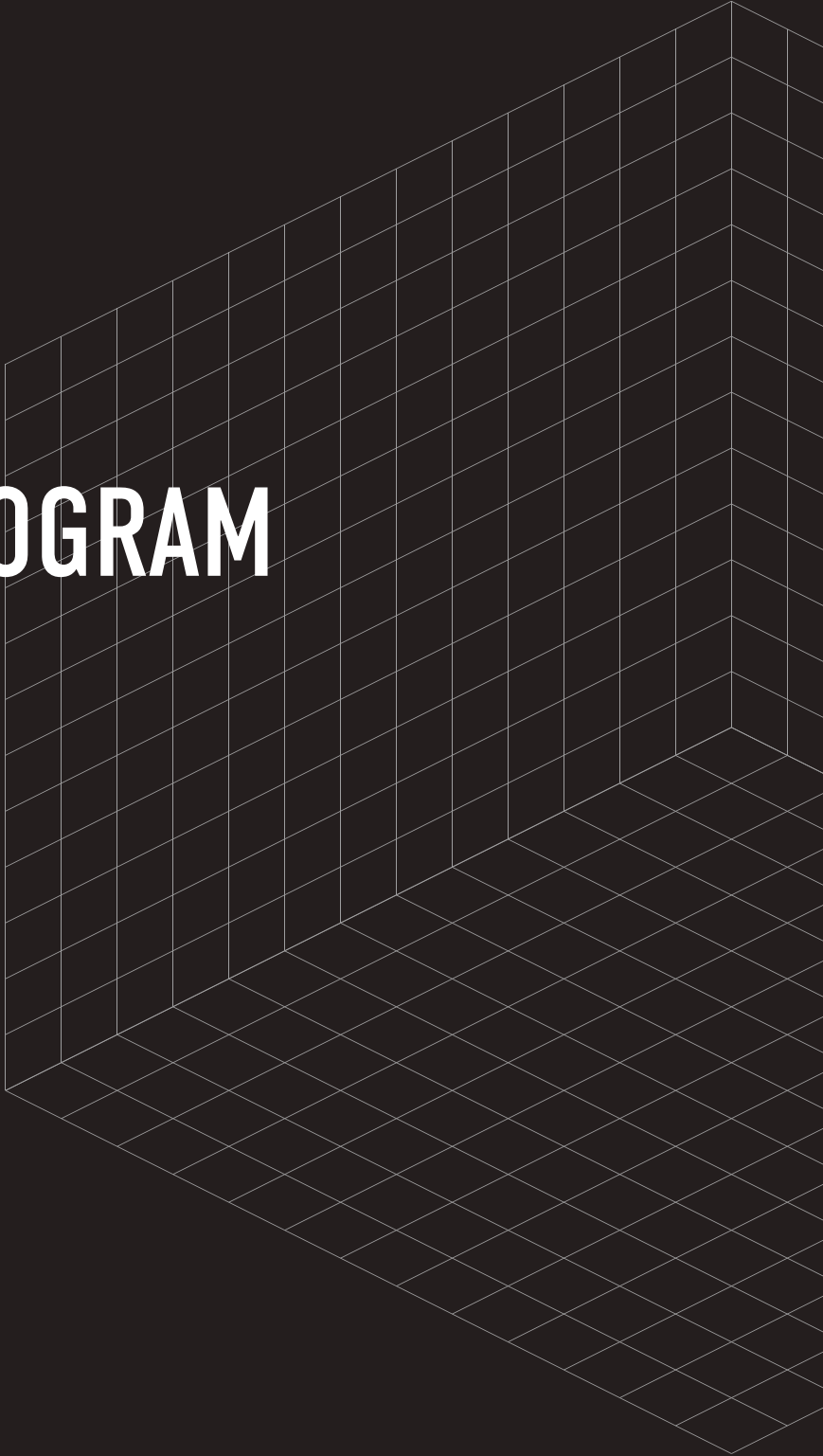
NOV - MAR

	ACTIVITY	DELIVERABLES
PHASE 1	SEO	<ul style="list-style-type: none"><li>• Keyword gap analysis</li><li>• Backlink gap analysis</li><li>• Additional keyword research</li><li>• Website health analysis</li></ul>
PHASE 2	Scope	<ul style="list-style-type: none"><li>• Discussion guide</li><li>• Scope meeting</li></ul>
PHASE 3	Architecture & Timeline	<ul style="list-style-type: none"><li>• Timeline of work</li><li>• Architecture of website</li><li>• Revised estimate if applicable</li></ul>
PHASE 4	Portal Setup	<ul style="list-style-type: none"><li>• Setup portal users</li><li>• IP filters</li><li>• Connect social</li><li>• Google AMP setup</li><li>• Connect email DNS</li><li>• Google Analytics, Search Console, and Tag Manager setup</li></ul>
PHASE 5	Content	<ul style="list-style-type: none"><li>• (32) pages of copywriting</li><li>• Page titles/meta descriptions for all pages</li><li>• Stock photography and iconography</li></ul>
PHASE 6	Mockups	<ul style="list-style-type: none"><li>• (3) design mock-ups</li><li>• (1) Image CTA template</li></ul>
PHASE 7	Wireframes	<ul style="list-style-type: none"><li>• (16) wireframes</li></ul>
PHASE 8	Development	<ul style="list-style-type: none"><li>• Up to (48) total templates (including system, subscription and landing page/thank you page templates)</li><li>• <b>Assumes SMS to setup team HubDB and update LP/TYP</b></li><li>• Includes blog migration</li><li>• Setup any new CSS styling</li><li>• Create new menu</li><li>• Create new footer</li><li>• Browser mobile testing</li></ul>
PHASE 9	Go Live	<ul style="list-style-type: none"><li>• Final site audit</li><li>• Final DNS setup</li><li>• 301 URL Redirects (&lt;150 pgs)</li><li>• XML sitemap submission</li></ul>



# INBOUND MONTHLY PROGRAM

STARTS MARCH



# MONTHLY CORE INBOUND PROGRAM

## ATTRACT

### BLOG ARTICLES – 62 POINTS/QTR

**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 7 blogs/qtr, format and publish in HubSpot. Includes interviews w/ SMEs for 3 of the blogs

#### SMS

- Write 6 blogs/qtr, format and publish in HubSpot
- Review and approve blog articles
- Provide access to SMEs as needed

## ATTRACT

### CONTENT PROMOTION – 3 POINTS/QTR

**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

#### Weidert Group

- Create and send monthly blog-in-review email newsletter

#### SMS

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

# MONTHLY CORE INBOUND PROGRAM

## ATTRACT

### PAID ADVERTISING/PPC – 6 POINTS/MO + \$4,000 MONTHLY AD SPEND

**PURPOSE:** Paid ads can make SMS, its key content, and information about its products and services visible at or 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 SMS in image-based ad channels like Google Display and LinkedIn.

A \$4,000 monthly budget for PPC search and display ads, executing on the recommendations in SMS' Marketing Plan & Playbook, is recommended. We are recommending monthly management for:

- Google Search and Display Ads
- LinkedIn Ads
- Facebook Ads

#### Weidert Group

- Create ads and manage campaigns

#### SMS

- Review and approve ads



# MONTHLY CORE INBOUND PROGRAM

## ENGAGE

### TARGET-SPECIFIC ADVANCED (GATED) CONTENT - 41

#### POINTS/QTR

**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 with content support landing page, thank you page, email, and CTA graphic each quarter. Weidert Group will send the promotional email for the content pieces in HubSpot.

#### SMS

- Create (1-2) advanced content pieces with content support landing page, thank you page, email and CTA graphic each quarter. Weidert Group will send the promotional email for the content pieces in HubSpot.
- Review and approve content
- Provide access to SMEs as needed

# MONTHLY CORE INBOUND PROGRAM

ATTRACT   ENGAGE   TRACK, ANALYZE & ADJUST

## GROWTH-DRIVEN DESIGN (GDD) & SEO OPTIMIZATION CYCLES – 96 POINTS/QTR

**PURPOSE:** Leverage user data to inform continuous improvements to the site.

Cycles of ongoing updates to the client's website each month (1 cycle = 6 weeks) using user data to determine what those updates/changes will be. Goal is to conduct ongoing improvement so the site is in an "always optimized" state. Each cycle includes:

- 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
- Review website performance data from various tools
- Develop action plan related to data
- Develop associated goals
- Provide insights on buyers, buyers' journeys, etc., provided by analytics

### Weidert Group

- Provide agenda and call summaries for each status call
- Implement action plan - 28 points each cycle (56 total for quarter) to "build" phase for improvement recommendations
- 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.

### SMS

- Attend 60-minute monthly cycle meeting, approve recommendations for action plan
- Complete link outreach to high-potential websites per Weidert Group's guidance

# MONTHLY CORE INBOUND PROGRAM

## TRACK, ANALYZE & ADJUST

### 90-DAY ROADMAPMING – 27 POINTS/QTR (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)

#### SMS

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

## TRACK, ANALYZE & ADJUST

### LEVEL 2 MTGS & MARKETING SUPPORT – 54 POINTS/QTR

**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

#### SMS

- Attend status calls every other week

# QUARTERLY **FLEX** BUDGET

**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 the services listed below.

## **FLEX POINTS RECOMMENDATION – 30 POINTS/QTR**

### **OPTIMIZED BLOGS**

- Optimized 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, 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**

- Scoping required

### **WEBINAR SUPPORT**

- Scoping required

### **SALES ENABLEMENT**

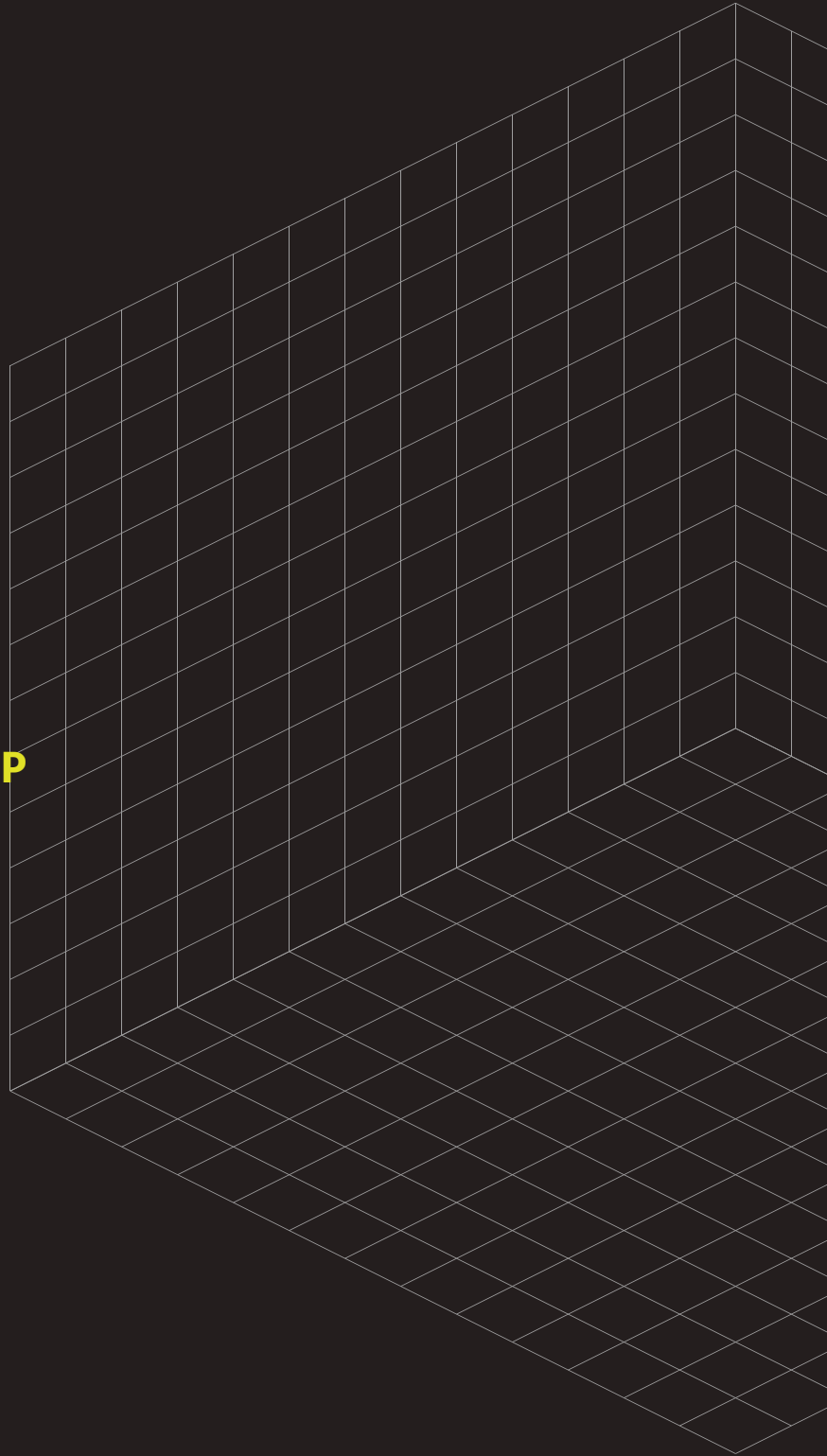
- Scoping required

### **CUSTOMER FEEDBACK GATHERING/SURVEY**

- Scoping required

# ABOUT US

WEIDERT GROUP



# YOUR TEAM

## ACHIEVEMENTS

- We've been a HubSpot partner for more than 10 years, and we practice all that we preach
- We reached Diamond level partner status in 2020 – one of only 32 in the U.S.
- We've won multiple North America HubSpot Impact awards for website and inbound results
- Multiple winner of various Best Company awards

## THE TEAM

- 37 full-time, in-house employees.
- Employee-owned company (ESOP) 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 37 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 written content for complex industries and companies such as:



OmPrompt

KloudData



SOLVOYO



Preact



INVESTORS  
COMMUNITY BANK

KAYSUN

US Lubricants



SENTRY

GRANDE  
CUSTOM INGREDIENTS GROUP



SEAGATE



WIPFLI  
CPAs and Consultants



GORDON FLESCH  
COMPANY, INC.  
BUSINESS TECHNOLOGY. MANAGED.



CENTERED AROUND YOU

CUNA MUTUAL GROUP



TANK COMPANY  
Employee Owned



CRAY



PUMPTEC



FABIO PERINI  
KÖRBER SOLUTIONS



# 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 →

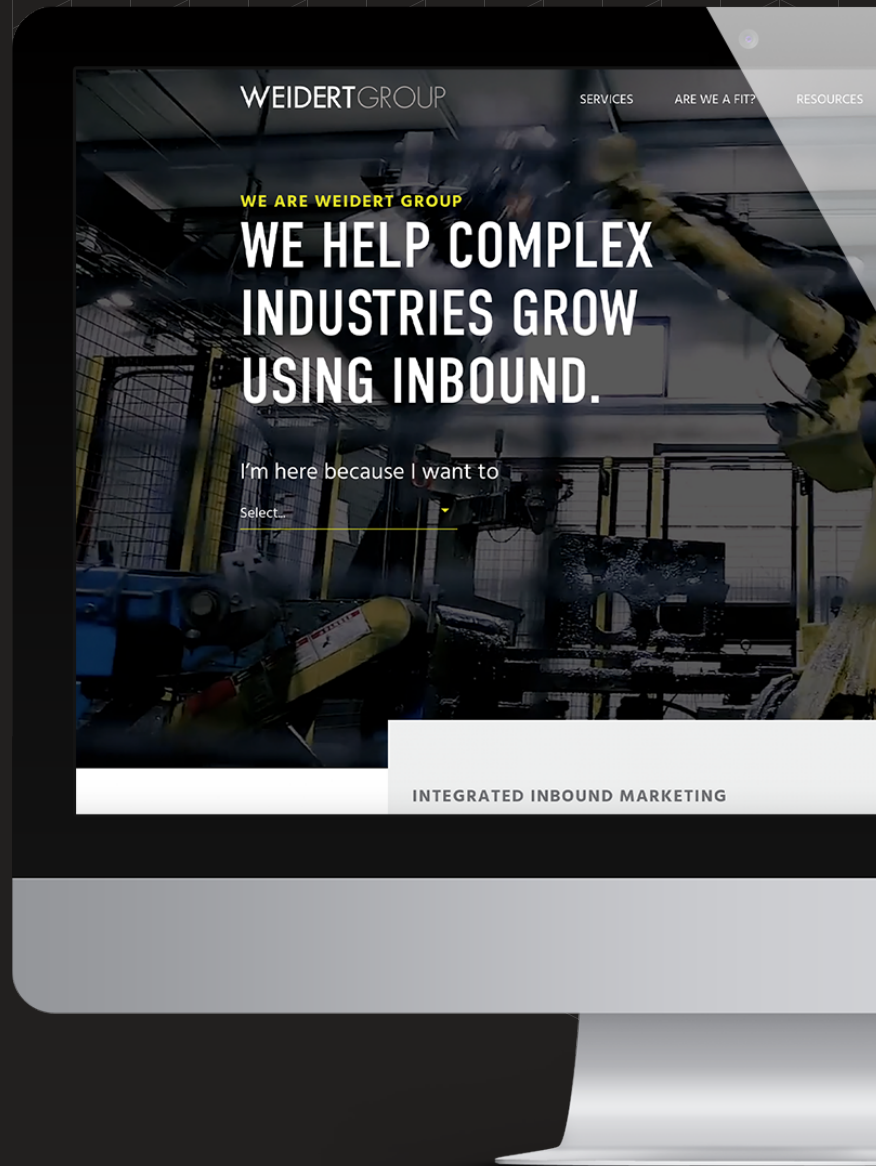
**90k** TOTAL TRAFFIC

290 →

**77k** ORGANIC TRAFFIC

11 →

**500** LEADS



# 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

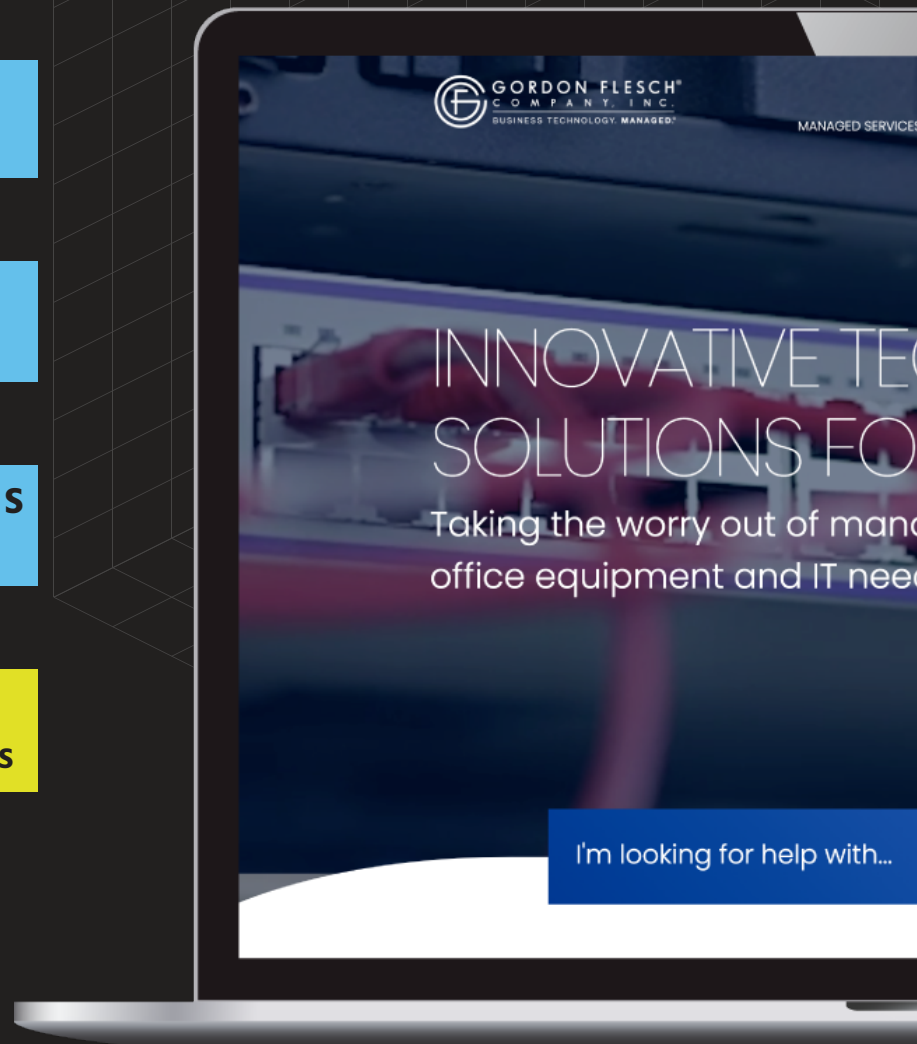
**230** NEW SQLS  
IN 5 MONTHS

**\$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



# 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.

Results 10 months after site launch:

**39%** INCREASE IN SALES IN THE FIRST NINE MONTHS

**89%** INCREASE IN AVERAGE NEW CUSTOMER SALE

**33%** REDUCTION IN CUSTOMER ONBOARDING TIME AND SALES CYCLE

## 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.



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

# “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](http://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)
- HubSpot COS Design Certification (2014 - present)

**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: ★★★★★

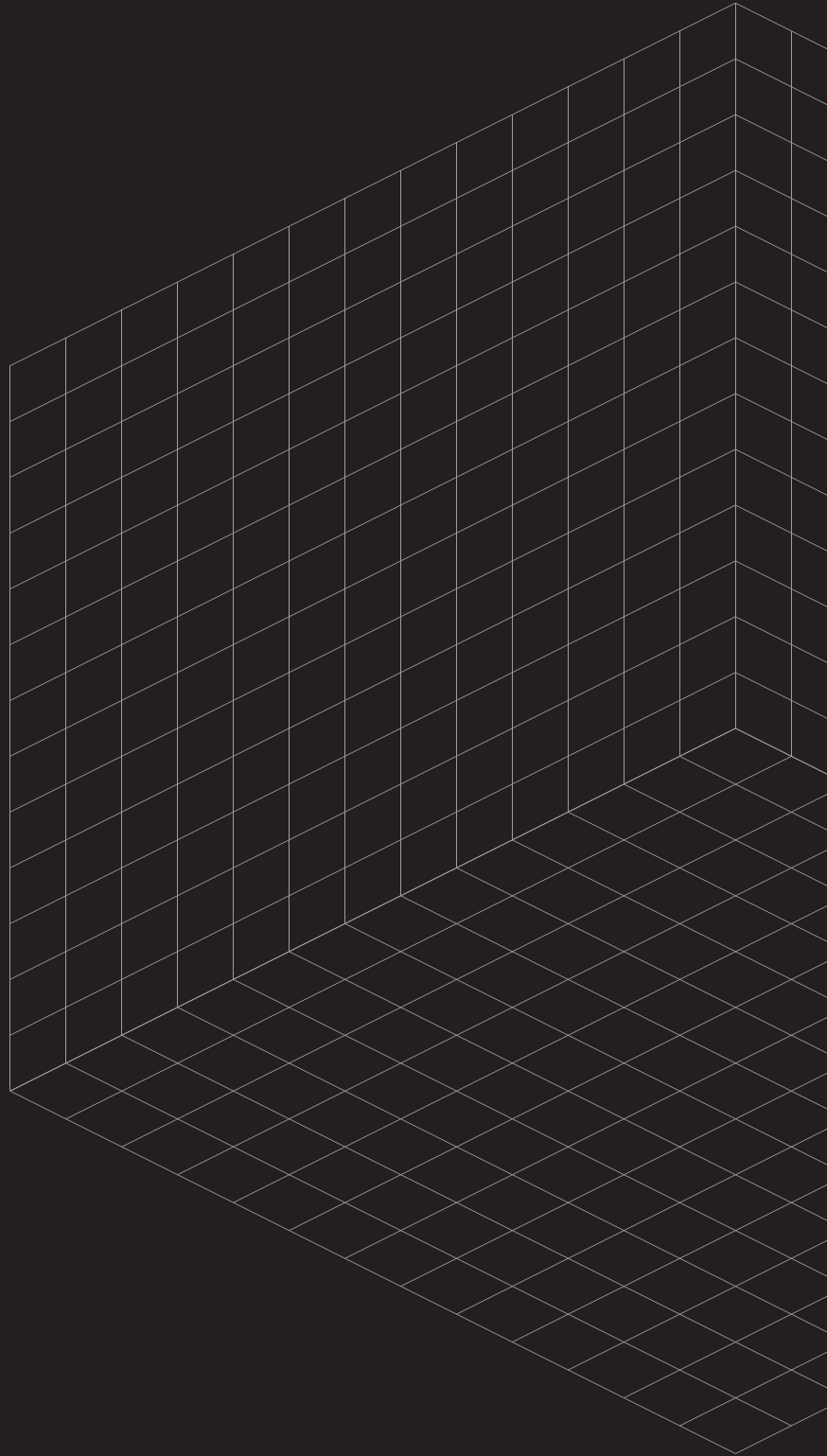
**Senior VP at Dfr Solutions**  
11-50 employees  
Baltimore, Maryland

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

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



# AGREEMENT



# TECHNOLOGY BUDGET

## HUBSPOT ENTERPRISE CRM SUITE

- Marketing Hub Enterprise with 40,000 Marketing contacts
- All non-marketing contacts are free, up to a limit of 15 million overall contacts
- Everyone in your company gets access to HubSpot's free features
- Sales Hub Enterprise with 10 users
- Service Hub Enterprise with 10 users
- CMS Hub Enterprise

**Total: \$4,300/month** (billed at \$51,600 per year)

Note: HubSpot's onboarding one-time fees (\$12,000) waived in lieu of working with Weidert Group

# FOUNDATIONAL BUDGET

SMS PRICE PER POINT: \$135

OCT - FEB



## SMS Oct '21 - Feb '22 Roadmap Planning Workbook

### FOCUS AREA 1: SMS INBOUND PLAN & PLAYBOOK

Service Type	Quantity	Points	Total Points	\$ Cost
Kickoff & Internal Meetings	1	34	34	\$4,590.00
Customer Interviews	1	18	18	\$2,430.00
SEO Content Strategy	1	26	26	\$3,510.00
Persona Workshop & Development	1	26	26	\$3,510.00
Competitive Advantage & Positioning	1	8	8	\$1,080.00
Messaging	1	8	8	\$1,080.00
Progress Presentation	1	24	24	\$3,240.00
Content & Buyer Journey Workshop	1	25	25	\$3,375.00
Content Inventory & Audit	1	20	20	\$2,700.00
90-Day Editorial Calendar	1	10	10	\$1,350.00
Content Promotion Strategy--Social Media & Paid Ads	1	14	14	\$1,890.00
Lead Qualification, Lead Scoring, and Marketing Automation: F	1	18	18	\$2,430.00
Lead Management (Sales) Strategy	1	8	8	\$1,080.00
CRM Management Strategy for Marketing Contacts	1	2	2	\$270.00
Reporting & KPI Strategy	1	7	7	\$945.00
Final Presentation	1	24	24	\$3,240.00
<b>Subtotal</b>			<b>272</b>	<b>\$36,720.00</b>

### FOCUS AREA 2: SET-UP

Service Type	Quantity	Points	Total Points	\$ Cost
HubSpot Mktg Portal Set-Up	1	4	4	\$540.00
Permission Pass Email & Data Cleanse	1	11	11	\$1,485.00
Content Template Design	1	18	18	\$2,430.00
Marketing Contacts & Maintenance Set-Up	1	12	12	\$1,620.00
Marketing Automation Initial Set-Up	1	30	30	\$4,050.00
Paid Ads Set-Up	1	46	46	\$6,210.00
Reporting Databoards Set-Up	1	6	6	\$810.00
<b>Subtotal</b>			<b>127</b>	<b>\$17,145.00</b>

### FOCUS AREA 3: KICKSTARTERS

Service Type	Quantity	Points	Total Points	\$ Cost
Kickstart Campaign	1	45	45	\$6,075.00
Optimized Blogs	5	5	25	\$3,375.00
<b>Subtotal</b>			<b>70</b>	<b>\$9,450.00</b>

### FOCUS AREA 4: STRATEGY & PROGRAM SUPPORT

Service Type	Quantity	Points	Total Points	\$ Cost
Strategy: Level 2 Meetings & Marketing Support	1	90	90	\$12,150.00
<b>Subtotal</b>			<b>90</b>	<b>\$12,150.00</b>

### FOCUS AREA 5: WEBSITE REDESIGN

Service Type	Quantity	Points	Total Points	\$ Cost
Website Redesign	1	600	600	\$81,000.00
<b>Subtotal</b>			<b>600</b>	<b>\$81,000.00</b>

### TOTALS

<b>Proposed Roadmap Program Total</b>		<b>0</b>	<b>1159</b>	<b>\$156,465.00</b>
<b>TOTALS</b>		<b>0</b>	<b>1159</b>	<b>\$156,465.00</b>

- **Foundational Work** (all but website) to be split billed evenly between the months of October-Feb
- **Website Work** to be split billed evenly between the months of Nov - Feb





SMS PRICE PER POINT: \$135



## SMS Mar - May 2022 Roadmap Planning Workbook

### FOCUS AREA 1: ATTRACT

Service Type	Quantity	Points	Total Points	\$ Cost
Content : Blog Article - Technical	4	8	32	\$4,320.00
Content : Blog Article - Technical, w/ Interview	3	10	30	\$4,050.00
Email: Monthly Blog Digest, Existing RSS Template	3	1	3	\$405.00
Paid Ads Management (Does not include ad spend)	3	6	18	\$2,430.00
<b>Subtotal</b>			<b>83</b>	<b>\$11,205.00</b>

### FOCUS AREA 2: ENGAGE

Service Type	Quantity	Points	Total Points	\$ Cost
Content : Advanced: 5-8 Pages	1	27	27	\$3,645.00
Content Support : Email, LP, TY, CTA	1	14	14	\$1,890.00
<b>Subtotal</b>			<b>41</b>	<b>\$5,535.00</b>

### FOCUS AREA 3: TRACK, ANALYZE, ADJUST

Service Type	Quantity	Points	Total Points	\$ Cost
Strategy: Quarterly Content Editorial Planning	1	11	11	\$1,485.00
90-Day Roadmap	1	16	16	\$2,160.00
Website: Faster GDD CI Cycle	2	40	80	\$10,800.00
SEO: Ongoing SEO Support & Maintenance 2: Pro	2	8	16	\$2,160.00
<b>Subtotal</b>			<b>123</b>	<b>\$16,605.00</b>

### FOCUS AREA 4: STRATEGY & PROGRAM SUPPORT

Service Type	Quantity	Points	Total Points	\$ Cost
Strategy: Level 2 Meetings & Marketing Support	1	54	54	\$7,290.00
Flex Budget	1	30	30	\$4,050.00
<b>Subtotal</b>			<b>84</b>	<b>\$11,340.00</b>

### TOTALS

<b>Proposed Roadmap Program Total</b>		<b>0</b>	<b>331</b>	<b>\$44,685.00</b>
<b>TOTALS</b>			<b>331</b>	<b>\$44,685.00</b>

- **\$44,685 to be split billed evenly** between months Mar - May (\$14,895 per month)
- **Does not include** \$4,000 per month ad spend



# 12-MONTH BUDGET RECOMMENDATION

SMS PRICE PER POINT: \$135

WEIDERT GROUP BUDGET												
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	August	Sept
<b>FOUNDATIONAL ROADMAP &amp; WEBSITE</b>												
<b>Foundational Roadmap</b> (includes Playbook, set-up, content kickstarters & level 2 mtgs/support)	111	112	112	112	112							
<b>Website Redesign</b>		150	150	150	150							
<b>FEB-APRIL 90-DAY ROADMAP</b>												
<b>Inbound Core Program + Flex</b>						110	110	111				
<b>MAY-JULY 90-DAY ROADMAP</b>												
<b>Inbound Core Program + Flex</b>									110	110	111	
<b>AUG-OCT 90-DAY ROADMAP</b>												
<b>Inbound Core Program + Flex</b>												110
<b>Roadmap Totals</b>	111	262	262	262	262	110	110	111	110	110	111	110
<b>Total Investment</b>	\$14,985	\$35,370	\$35,370	\$35,370	\$35,370	\$14,850	\$14,850	\$14,985	\$14,850	\$14,850	\$14,985	\$14,850
<b>ADDITIONAL BUDGET</b>												
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	August	Sept
<b>Ad Spend</b>						\$4000	\$4000	\$4000	\$4000	\$4000	\$4000	\$4000
<b>HubSpot License</b>	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300
<b>Total Investment</b>	\$4,300	\$4,300	\$4,300	\$4,300	\$4,300	\$8,300	\$8,300	\$8,300	\$8,300	\$8,300	\$8,300	\$8,300



# 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. 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 BE READY TO START!

1

**Review proposal and provide feedback**

2

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

3

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

4

**Finalize license agreement with HubSpot**



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