



MARKETING DIRECTIVE - CONFIDENTIAL

December 21, 2024

SELLING DIGITAL MARKETING SERVICES

Business Consultants are to do the following actions in the established sequence. After each action is done with complete comprehension, check it off by initialing.

Business Consultant

Date Started

___ **1. STUDY:** Read and ensure all words are cleared in “A Message to Garcia”.

___ **2. STUDY:** Read the book Website Marketing Basics. Ensure you fully understand every word and concept before moving onto the next.

___ **3. ESSAY:** Describe in your own words the differences between Organic Marketing and PPC.

___ **4. ESSAY:** In your own words, describe what is meant by “Don’t Make Me Think”.

___ **5. PRACTICAL:** Go to the Course Room and locate the book, “Don’t Make Me Think”.

___ **6. PRACTICAL:** Go to <https://dentprosolutions.com/> and find the marketing button and main message.

___ **7. PRACTICAL:** Go to localsearch4.com, check out the sliders and compare the buttons to the main message.

___ **8. ESSAY:** In your own words, describe a marketing button and message.

___ **9. PRACTICAL:** Go to <https://expansionsupportservices.com/about-us/> and find things that describe how we are likely different from our competitors.

___ **10. ESSAY:** In your own words, describe what a “Competitive Advantage” is.



___ **11. EXERCISE:** Go to Alure.com and study the opening screen and the amount of Call to Action (CTAs) elements this site has on its opening screen.

___ **12. ESSAY:** In your own words, describe what a “Conversion” is.

___ **13. STUDY:** Read and study the Directive, “Keyword List”.

___ **14. STUDY:** Read and study the Directive, Creating Active Customers.

___ **15. ESSAY:** Describe how a web page is organized and similar to a newspaper.

___ **16. ESSAY:** What does Get Found do for the client and what do we do in delivering this service?

___ **17. PRACTICAL:** Go to the internet and do a few GEO-KEYWORD searches recognizing the results that are organic search results, results on maps and results on paid/sponsored search results.

___ **18. PRACTICAL:** Go to the Services page on the Expansion Support Services at <https://expansionsupportservices.com/clearwater-lead-generation-services/> and note the URL and see the continued use of “Clearwater Lead Generation Services.”

Now go to other websites and look at their URLs on their services pages.

___ **19. PRACTICAL:** Go to any webpage, **right click** anywhere on it, then click on “**View Page Source**”. Scroll up and down a bit. Realize this is the computer code, also referred to as HTML, that search engines’ view. Search engines are computers. They do not see the images and other elements, only the code.

___ **20: PRACTICAL**

A. In your Google search bar, do a search for “Hurricane Shutters Bradenton Florida”



1. Notice if Armored Dade comes up as a sponsored site, in Google Maps and organically.

If it comes up organically, click on the hyperlink to take you to the page.

2. Notice the URL includes the term Hurricane Shutters Bradenton.
3. Notice the use of the term Hurricane Shutters throughout the page.
4. Put your mouse over the image, right click and the click on **“Inspect”**. Look to see the Alt Att (The Alt Att stands for Alternative Attribute which simply is a coded new name for the image.) Find and read the Alt Att for this image.
5. Right click on the page and click on View Page Source. Find the page title and description in the code. Note the page title was (or should be) the same words that were hyperlinked when you did your search at the start of this exercise and the description in the code was (or should have been) the same description listed under the hyperlink in the Google Search.

21. PRACTICAL – SEO Quake

- A. If not already on your computer, download SEO Quake.
- B. Go to any website’s home page, right click then click on SEO Quake, then “Page Info”. Notice that you can quickly see the Page Title, Keywords and Description.
- C. Using SEO Quake, click on Diagnostics.
 1. Find the Headings. Look to see if the client uses geography and their keyword in their Headings 1 and Headings 2.
 2. Scroll to the near bottom on the Diagnostics page and see if the client is or is not using Google Analytics. Know if they are not using Analytics, they probably have no idea how their website is performing.



___ **22. STUDY:** Review all websites at

<https://expansionsupportservices.com/sites/>

These are sites that can be used when selling clients. You will not send the link to this page but can use it when screen sharing showing one at a time.

Note: We do not bother our clients by giving out their name and phone numbers so prospects can call them. In addition to distracting our customers from their business, it could adversely effect our business should they depart our service due to receiving abundance of calls. So, don't give your prospects our clients names or phone numbers.

___ **23. REVIEW:** Review the Packages and terms that can be found at:

- a. ___ [Expansionsupportservices.com/easy95](https://expansionsupportservices.com/easy95), then /order95
- b. ___ [Expansionsupportservices.com/easy195](https://expansionsupportservices.com/easy195), then /order195
- c. ___ [Expansionsupportservices.com/easy395](https://expansionsupportservices.com/easy395), then order395

___ **24. EXERCISE:** Go to /order395 and complete a practice order form, ensuring you study the terms. Review the email the client will receive and the email the BC will receive.

___ **25. STUDY:** Read and understand the Google Local Service Ads, also known as Google Guarantee, at:

https://ads.google.com/intl/en_us/home/local-services-ads/

___ **26. WATCH:** "How to sell Google Ad Campaigns" here...

<https://www.youtube.com/watch?v=M7AkCT4pJbE>



___ **27. EXERCISE:** Make a list of any product that you do not 100% understand. Get with your trainer for clarification on these services.

___ **28. READ:** Read and understand, “Coffee is for Closers, and so are Leads”

___ **29. READ:** Read Directive, “ESS Referral Program”

___ **30. READ:** Download the CMA template. Read it and clear all words and concepts as you go through it. Get with your trainer on anything you don’t understand as they arise.

___ **31. ESSAY:** List 3 examples of Geo-Keywords, one using a business category, one using a product/service and the last a symptom.

___ **32. ESSAY:** Describe what a Ranking Page is. Sketch out an example of a Ranking Page.

___ **33. CHECKOUT:** Get a checkout from your trainer on all words and concepts in the CMA. If you flunk or lag in answering, restudy the entire CMA clearing all words and concepts as you progress.

___ **34. PRACTICAL:** Produce a CMA.

Save the CMA Template to “CMA – Practical”.

Change out everything in light blue to a company or made up company.

Get Market Research and paste into the CMA from

<https://docs.google.com/spreadsheets/d/1nqbjvXq1KKas79PqYaEOCF3q4oeFY8xuVXn0r-MAO0M/edit?gid=1398577598#gid=1398577598>

Paste ranking report into CMA. Get the data by running a ranking report (ask trainer to show you how) using keywords from

<https://www.toptal.com/marketing/mergewords>

___ **35. STUDY:** The Directive, “Completing the Advanced Service Sale”



___ **36. READ:** Read and understand the Directive, “Cheat Sheet – Delivering the CMA”

___ **37. EXERCISE:** Using the Cheat Sheet, role play delivering a CMA to a coach. Do this as many times as needed until comfortably delivering a CMA to a customer.

___ **38. DRILL:** Do the Qualified Business Consultant Drill to a pass by your Trainer.

___ **39. STUDY:** Re-read A Message to Garcia.

___ **PRODUCTION:** Begin or continue selling and delivering CMAs until you have closed 5 new active customers within a 5-week period.



A Message to Garcia

Written by Elbert Hubbard 1899

(This story was pulled from the MIT website)

In all this Cuban business there is one man stands out on the horizon of my memory like Mars at perihelion.

When war broke out between Spain and the United States, it was very necessary to communicate quickly with the leader of the Insurgents. Garcia was somewhere in the mountain fastnesses of Cuba - no one knew where.

No mail or telegraph could reach him.

The President must secure his co-operation, and quickly. What to do!

Someone said to the President, "There's a fellow by the name of Rowan will find Garcia for you, if anybody can." Rowan was sent for and given a letter to be delivered to Garcia.

How "the fellow by name of Rowan" took the letter, sealed it up in an oil-skin pouch, strapped it over his heart, in four days landed by night off the coast of Cuba from an open boat, disappeared into the jungle, and in three weeks came out on the other side of the island, having traversed a hostile country on foot, and having delivered his letter to Garcia, are things I have no special desire now to tell in detail.

The point I wish to make is this: McKinley gave Rowan a letter to be delivered to Garcia; Rowan took the letter and did not ask, "Where is he at?" By the Eternal!

There is a man whose form should be cast in deathless bronze and the statue placed in every college in the land.

It is not book-learning young men need, nor instruction about this or that, but a stiffening of the vertebrae which will cause them to be loyal to a trust, to act promptly, concentrate their energies; do the thing - "carry a message to Garcia!"



General Garcia is dead now, but there are other Garcias. No man, who has endeavored to carry out an enterprise where many hands were needed, but has been well-nigh appalled at times by the imbecility of the average man - the inability or unwillingness to concentrate on a thing and do it.

Slipshod assistance, foolish inattention, dowdy indifference, and half-hearted work seem the rule; and no man succeeds, unless by hook or crook, or threat, he forces or bribes other men to assist him; or mayhap, God in His goodness performs a miracle, and sends him an Angel of Light for an assistant.

You, reader, put this matter to a test: You are sitting now in your office—six clerks are within your call. Summon any one and make this request: “Please look in the encyclopedia and make a brief memorandum for me concerning the life of Corregio.”

Will the clerk quietly say, “Yes, sir,” and go do the task?

On your life, he will not. He will look at you out of a fishy eye, and ask one or more of the following questions: Who was he? Which encyclopedia? Where is the encyclopedia? Was I hired for that? Don’t you mean Bismarck? What’s the matter with Charlie doing it? Is he dead? Is there any hurry? Shan’t I bring you the book and let you look it up yourself? What do you want to know for?

And I will lay you ten to one that after you have answered the questions, and explained how to find the information, and why you want it, the clerk will go off and get one of the 2 other clerks to help him find Garcia - and then come back and tell you there is no such man.

Of course I may lose my bet, but according to the Law of Average, I will not. Now if you are wise you will not bother to explain to your “assistant” that Corregio is indexed under the C’s, not in the K’s, but you will smile sweetly and say, “Never mind,” and go look it up yourself.



And this incapacity for independent action, this moral stupidity, this infirmity of the will, this unwillingness to cheerfully catch hold and lift, are the things that put pure socialism so far into the future.

If men will not act for themselves, what will they do when the benefit of their effort is for all? A first mate with knotted club seems necessary; and the dread of getting "the bounce" Saturday night holds many a worker in his place. Advertise for a stenographer, and nine times out of ten who apply can neither spell nor punctuate - and do not think it necessary to. Can such a one write a letter to Garcia?

"You see that bookkeeper," said the foreman to me in a large factory. "Yes, what about him?" "Well, he's a fine accountant, but if I'd send him to town on an errand, he might accomplish the errand all right, and, on the other hand, might stop at four saloons on the way, and when he got to Main Street, would forget what he had been sent for."

Can such a man be entrusted to carry a message to Garcia? We have recently been hearing much maudlin sympathy expressed for the "down-trodden denizen of the sweat shop" and the "homeless wanderer searching for honest employment," and with it all often go many hard words for the men in power.

Nothing is said about the employer who grows old before his time in a vain attempt to get frowsy ne'er-do-wells to do intelligent work; and his long patient striving with "help" that does nothing but loaf when his back is turned.

In every store and factory there is a constant weeding-out process going on. The employer is constantly sending away "help" that have shown their incapacity to further the interests of the business, and others are being taken on. No matter how good times are, this sorting continues, only if times are hard and work is scarce, this sorting is done finer - but out and forever out, the incompetent and unworthy go.

It is the survival of the fittest. self-interest prompts every employer to keep the best-those who can carry a message to Garcia.



I know one man of really brilliant parts who has not the ability to manage a business of his own, and yet who is absolutely worthless to anyone else, because he carries with him constantly the insane suspicion that his employer is oppressing, or intending to oppress, him.

He can not give orders, and he will not receive them. Should a message be given him to take to Garcia, his answer would probably be, "Take it yourself."

Tonight this man walks the streets looking for work, the wind whistling through his threadbare coat. No one who knows him dare employ him, for he is a regular firebrand of discontent. He is impervious to reason, and the only thing that can impress him is the toe of a thick-soled No. 9 boot.

Of course I know that one so morally deformed is no less to be pitied than a physical cripple; but in your pitying, let us drop a tear, too, for the men who are striving to carry on a great enterprise, whose working hours are not limited by the whistle, and whose hair is fast turning white through the struggle to hold the line in dowdy indifference, slipshod imbecility, and the heartless ingratitude which, but for their enterprise, would be both hungry and homeless.

Have I put the matter too strongly? Possibly I have; but when all the world has gone a-slumming I wish to speak a word of sympathy for the man who succeeds - the man who, against great odds, has directed the efforts of others, and, having succeeded, finds there's nothing in it: nothing but bare board and clothes.

I have carried a dinner-pail and worked for a day's wages, and I have also been an employer of labor, and I know there is something to be said on both sides. There is no excellence, per se, in poverty; rags are no recommendation; and all employers are not rapacious and high-handed, any more than all poor men are virtuous.

My heart goes out to the man who does his work when the "boss" is away, as well as when he is home.



And the man who, when given a letter for Garcia, quietly takes the missive, without asking any idiotic questions, and with no lurking intention of chucking it into the nearest sewer, or of doing aught else but deliver it, never gets “laid off,” nor has to go on strike for higher wages.

Civilization is one long anxious search for just such individuals. Anything such a man asks will be granted; his kind is so rare that no employer can afford to let him go.

He is wanted in every city, town, and village - in every office, shop, store and factory.

The world cries out for such; he is needed, and needed badly—the man who can Carry a message to Garcia.



Expansion Support Services

October 15, 2023

Key Words List - Sales

What is a Qualified Prospect (QP)?

The owner and financial decision maker of a business that is listed on our Targeted Business List who wants to expand, will fully participate in a briefing, and is engaged getting his/her businesses expanding.

What is an Appointment?

A pre-set meeting between a Qualified Prospect and Consultant whereas the QP is willing to be present and engage in an in-person or a tele-conference (phone call with screen sharing) briefing on our company, our services, and how we help businesses expand. This appointment may or may not include the delivery of a free service.

If the prospect asks “You aren’t going to try and sell me something?”, the answer is “Of course we are hoping to turn you into a customer if we can help you expand.”

What is a Presentation?

A verbal meeting that occurs between a QP and Consultant whereas the QP communicates about their business goals and current situations, originates a problem that can be solved through marketing, listens to and fully understands the solution to resolve the stated problem, and makes a decision.

What is a Proposal?

A written offer for services that describes features, costs and terms. When prospects/customers are presented with an ESS Order Form, they are receiving our proposal. The offer should address a business problem the client wants to resolve.



What is a Deal?

A pending deal occurs when a service is presented and the QP is interested and considering purchasing the service. A won deal occurs when the QP orders a service and pays for it. A Deal lost is a pending deal whereas the QP elects to not order the service or the pending deal becomes stale.

What is an Introductory Service?

Introductory services are those offerings that provide a benefit to the client while also providing a forum for the new client to experience our company without paying any money. The Spotlight Story, Ranking Reports, Free Consultation, etc. are examples.

What is a Basic Service?

Basic services are those offerings that provide a benefit to the client while also providing a forum for the new client to experience our company by paying money but without making a large financial commitment. The Competitive Marketing Analysis (CMA) and Strategic Business Analysis (SBA) are two examples.

What is a Development Service

A Development Service is a service delivered based on the time it takes to complete. An example would be a website designed or redesigned by our Creative Arts Department.

What is an Active Customer?

An Active Customer is a client that fully completes an online or physical order form ordering a service that has a weekly or monthly service fee. An Active Customer fully understands what they purchased, understands and agrees to all terms of the service ordered, and only promised benefits listed in Company's promotional materials and Directives. An example would be our Get Found service, in which we get a client showing up in only searches.



EXPANSION DIRECTIVE – CONFIDENTIAL

January 13, 2022

CREATING ACTIVE CUSTOMERS

An Active Customer is one that has ordered a product that is provided on an on-going basis and has monthly service fee.

To turn new customers into Active Customers, such as getting a business onto our Get Found service, the client must understand some basics of what we are going to do so that they can make an affirmative decision to order our services.

The Expansion Support Services Get Found services gets a business's website to show up in searches in their hometown and neighboring towns. It's the foundation piece of the digital marketing puzzle as it creates an online footprint and communicates to search engines that our client exists.

Get Found Online

How do we do it? How does Expansion Support Services get better results than every other web development company?

After designing nearly 10,000 websites, our clients began contacting us because they wanted better visibility.

So, we spent a year doing a research project to determine exactly what Google, Yahoo, and Bing want in order to post a webpage.





What we discovered is, Google and the others want real companies showing up for services searched — in areas where they are located or that they service.

To provide this to Google, we created a technology where we develop dedicated pages for each service for each location.

ESS Magic Formula:

1 to 3 Dedicated Ranking Pages Per Geo-Keyword Search Term
= Show Up in a Google Search for the Geo-Keyword

For example: Tampa (Geo) + Back Pain (Keyword) = Geo-Keyword Search Term

If you are a chiropractor in Dunedin, Florida and want to show up in searches in Dunedin, Clearwater, and Tampa for “back pain”, “neck pain”, and “chiropractors”, you will need dedicated pages built based on the following geo-keywords:

Dunedin back pain	Clearwater back pain	Tampa back pain
Dunedin neck pain	Clearwater neck pain	Tampa neck pain
Dunedin chiropractors	Clearwater chiropractors	Tampa chiropractors

Targeted Cities (Geography) x Keywords
= Total Geo-Keyword Targeted Pages Needed

Our technology is to develop webpages in the same a newspaper is developed. We insert the geo-keywords in specific locations within the computer code where we know Google looks.

Each page will focus on one geo-keyword phrase. This phrase will be used throughout the computer code of that specific page.



Webpages are Coded Like Newspapers



Below are sections of a webpage's computer code that are nearly identical to a newspaper.

- **Title:** The New York Times titles each of their sections, for example, Front Page, Sports Page, Entertainment, etc. Similarly, each webpage in a website that we develop will have a title that includes the targeted geo-keyword.
- **Primary Heading:** "MEN WALK ON MOON" is the primary heading. Each webpage we develop will have a primary heading, also called a Heading 1 and it will contain the targeted geo-keyword.
- **Description:** "ASTRONAUTS LAND ON A PLAIN AFTER STEERING PAST CRATER" is a description of what the page is about. Each webpage we develop will have a description of the what the web page is about and it will contain the targeted geo-keyword.
- **Subheadings:** "Voice from Moon: Eagle has landed" and "A Powdery surface Found by Armstrong" are subheadings. Every webpage that we do will have a sub-heading, also referred to as a Heading 2, and it will contain the targeted geo-keyword.
- **Text:** There is text below the sub-headings in the newspaper. Every webpage we develop will have text below the sub heading and it will contain the targeted geo-keyword.



- **Images:** There are usually images/pictures in a news story. Every webpage we develop will include images labeled as the targeted geo-keyword.
- **Keywords:** Similar to a library's system to locate its books, each webpage has a line of code to specifically and quickly identify how the webpage should be categorized. This is called a keyword and we will use the geo-keyword phrase as the keyword.

The priorities to selling Get Found Services and Digital Marketing Campaigns are:

1. **Have rapport.** Even if you were the person that sold the client the CMA, spend more time asking non-business-related questions to the client and get them engaged.

2. **Have a problem.** Ensure there is something the client wants to handle. This can be a problem, upset, annoyance, dissatisfaction, etc., but there must really be something the client has stated. Perhaps he/she wants to make more money, perhaps he/she hates their web company, or perhaps they are just getting started.

The client not showing up in searches has been our bread and butter, followed closely by the lost revenue close.

The CMA will have a page that shows what search terms the client shows up for. For example, if the client has bad rankings, you'll leave your screen sharing on this page and chat about anything else giving this data time to marinate.

The lost revenue close is for the client that can take on more customers. Just find out how many more customers they could service without increasing expenses and multiply that number of customers times their average sale per customer. You can also multiply this number of customers by the lifetime value of a customer.

3. **Enlighten/Train the Client.** ESS uses consultive selling, which is to enlighten the client so they understand problems exist with their online marketing, what needs



to be done to patch them up, an understanding of what we are going to do and an understanding of what they are getting for the money they will pay to ESS.

For ESS Get Found services, a client must be brought to understand that they need 1-3 fully optimized pages for each geo-keyword they want to win. This may be 100, 200 or more pages. For example, Dunedin Carpet Cleaning and Dunedin Floor Cleaning would be two different pages as would Dunedin Carpet Cleaning and Clearwater Carpet Cleaning.

4. Understanding. The salesperson must be able to get the client to understand Geo-Keywords as a concept if they are to sell the Get Found service. With the Get Found Service, ESS is getting the client's organic online footprint well established. It gets their website showing up in searches based on their hometown and close by cities and towns.

The Get Found service lays the foundation for all other marketing and is the starting point for someone want to participate in online marketing.

Additionally, Get Found is also the start of Voice Search Optimization where someone will ask their phone "Who is the best roofer in Clearwater?"

5. Closing. We can't help the client if our Business Consultants don't get the client to sign the Order form and provide payment. If you really care for your client, be insistent that they order service while you are engaged in your sales cycle.

With the Get Found Service, the client will receive a Before and After ranking report at the 90-day point and then 90 days after so they can follow along in the progression.

Kurtis Kintzel,
President



SALES DIRECTIVE

September 19, 2024

“Coffee is for Closers, and so are Leads”

From the famous Alex Baldwin “pep” talk in the movie GlennGarry Glen Ross, he colorfully describes to a group of salesmen that coffee is for closers.

In 1992, we had a staff member quit with her reasoning being that we don’t treat everyone the same. She was absolutely right, we don’t. We’re not trying to be a socialistic company. We live in a tough world where the strong, the rock stars survive best. Those staff that produce what is needed and wanted from their post and generate income are rewarded differently than those that produce less.

A Business Consultant’s best leads are those that he/she generates him/herself. That said, there can be efficiencies & opportunities when the company backs up the Business Consultant by providing pre-set appointments with business owners.

The below chart specifies the Company’s commitment to BCs producing New Active Customers.

Weekly New Active Customers Produced	Weekly Appointments Set for Business Consultant
0	0-10
1	10-20
2	20-30
3	25-40
4+	30-50

Kurtis
President



SALES DIRECTIVE

September 19, 2024

ESS REFERRAL PROGRAM

Expansion Support Services offers to reduce its weekly or monthly Get Found Service fee if our client refers a prospective customer that becomes an Expansion Support Services Get Found Customer.

Our client's Get Found Service fee will be reduced by 50% of their referral's paid weekly or monthly Get Found Weekly/Monthly Service Fee, but this reduction will not reduce the weekly fee below \$10 per week.

If the referral cancels, NSF's, etc., the fee reduction will cancel and the billing will revert to the pre-referral fee amount.

If our customer refers a prospect to Company, they will inform the referral(s) that they have referred them to Expansion Support Services and that someone from ESS will be reaching out.

This is a pilot program and be effective till made Company Policy or its cancelled. If cancelled, existing weekly and monthly reductions will remain in effect.

Kurtis Kintzel



COMPANY DIRECTIVE - CONFIDENTIAL

October 20, 2020 Rev 2/21/24

Completing an Advanced Service Sale

Business Consultants

Treasury Staff

While on the phone or in person with the client, do the following:

1. While the client is still sharing the BC's computer screen, the BC goes over the services being ordered, all costs, and every term listed on the order form with the client ensuring they fully understand what they are ordering, our financial terms and gets their agreement that they want the offered services.
2. The BC now takes the client's payment information and fills out the payment voucher completely. If client's payment info is on file in HR, note that on voucher. While the client is on the phone with the BC, the BC takes the voucher to the Director of Income or their senior, the 1st payment is processed, and all recurring or future payments set-up. If the payment declines, the BC sorts this out with the client. The payment voucher is routed to the Treasury Manager. The person processing the payment informs the BC and the Sales Manager that the payment processed successfully and enters the auth code and amount billed into HR.
3. While the payment is being processed, the client now departs the screen share and goes to the ESS online order form for the product they are ordering. The CLIENT completes an original order form or our online order form. If the client is not near a computer, the BC may take the credit card, process the payment and gets the client to complete the online order form at the client's earliest convenience.
4. The BC routes the client to Tech Support or their senior to complete our hand-over First Call or to schedule a time when this can be done. This call



bridges the client from sales to product delivery. If Customer Service or Tech Support are not available, the BC schedules a time with the client when they can be available for this call.

The Business Consultant is done with the client.

5. BC receives a copy of the order in their email and then copies and pastes it into Highrise.
6. Conditional if not already done... BC creates a Deal in Highrise titled “XYZ Company – (service)”, then marks it won. The category is Get Found, which is the weekly or monthly service fee.
7. BC mails (not Email) a handwritten Thank You card to the client.

Kurtis
President



COMPANY DIRECTIVE - CONFIDENTIAL

December 19, 2024

CHEAT SHEET – DELIVERING A CMA

1. Review the client's CMA Order form, their website, and the CMA.
2. Orientate yourself to the clients hometown... Find out it's population, its location and other nearby cities and towns.
3. Contact the client, set up the screen share and ensure everyone that has anything to do with marketing decisions is also on the call. You are better off rescheduling the CMA when all decision makers and influencers are present than trying to close a "one-legger".
4. Re-Engage... get the customer talking by asking light questions, ideally something you learned about the client when selling the CMA. For example, "Can you believe the New England Patriots traded Tom Brady to the Tampa Bay Buccaneers? "
5. Discuss the client's goals, purposes and Aspirations, which you should have gotten an idea about when completing the CMA order form. For example, it looks like you did \$150,000 last year and you want to do \$200,000 this next year, is that still correct? What is your plan to get there?" You'll use this data to determine which service to offer the client and in the close.
6. Show cover letter and discuss we think they have real opportunities to expand.



7. Brief the client on the history of ESS. Your intention is to build confidence about our firm within the client.
8. Discuss 1st the simplicity of internet marketing. Ensure the client gets they only 1) have to exist, 2) get found in searches and 3) convert the visitor into a lead.
9. Go over their site covering,
 1. “Don’t Make Me Think” using their site,
 2. “Competitive Advantages” using our About Us page and really position ESS as the expert,
 3. “Marketing Buttons and Messages” using <https://dentprosolutions.com/> design,
 4. “Conversion Technologies”, using <https://www.alure.com/>
10. Market Research... Show the client that we know what people are searching and that not all keywords are equal. “Some People search ‘Car Repair’, some search ‘Auto Repair’ and these terms have different volumes of searches. To people, these terms are the same, but to a computer, these are different terms.
11. Discuss how their website is ranking. If poorly, leave the screen showing their poor ranking and discuss whatever you want while they are left viewing this page.
12. Leave the CMA and use a live example to educate on our “Geo-Keyword” tech. In chrome, search **Hurricane Shutters Bradenton Florida**.
 1. Show the client our client’s ad
 2. Show that our client shows up in Google My Business
 3. Show that our client shows up in organically.
 4. Click on the website from GMB and show how nice the site is



5. Use the **site:** to show how many pages the website has
6. Arrow back to the search page and click on the organic hurricane shutters page on Armored Dade.
 - i. Show the URL has Geo Keyword, using View Page Source, show the title has geo keyword, hover over image and click on Inspect showing ALT
 - ii. Show the headings and text has geo keywords
 - iii. Show May 2022 Marketing Report

13. Show the client how our services page is optimized for, “Clearwater Lead Generation Services”

14. Briefly go over our ranking tech in the CMA and the client’s tech and show that they do not use Geo Keywords.

15. Go over the competition. If the competitors ranking are using our tech, point that out and let the client know we’ll be doing that for them. If the clients showing up are just lucky, point that out to the client and inform that we can kill the competition on their behalf.

16. Go over the Strategic Plan

17. Scroll through all recommendations.

18. Close the deal.



TIPS

1. Ensure the client knows that we know what we are doing and we can handle their digital marketing on their behalf.
2. Be enthusiastic about handling their campaign, especially during the close.
3. Cover any of the terms while doing the CMA delivery so there are no surprises when you get to the order form.
4. Run the client's payment while they are on the phone.
5. Do not use any words the client does not know or are uncommon. Even the term SEO should not be used unless dealing with an internet marketing pro. The exceptions are words you will define during the presentation.