CONFIDENTIAL

EXPANSION DIRECTIVE
September 23, 2024

Delivering the CMA – Closing the New Active Customer

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. Turn in all Essays and to the Trainer and have the Trainer check out your Exercises.

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Internet Marketing or Business Consultant **Date Started**

___ **1. PRACTICAL**: Have a trained Sales Executive go through the CMA Delivery Sequence.

___ **2. STUDY:** Study 1 or 2 services sales pages and order forms ESS is currently selling.

- ___ https://expansionsupportservices.com/easy95/
- ___ https://expansionsupportservices.com/easy195/
- ___ https://expansionsupportservices.com/easy395/
- ___ https://expansionsupportservices.com/easy595/

___**3. PRACTICAL:** Complete the order form for Order195 using fictious data. Ensure you understand all the words and terms. Use your email address in the customer email address section and review the email that the you (as the client) receives.

___ **4. STUDY:** Read and understand the Directive “Cheat Sheet - Delivering a CMA”

___ **5. PRACTICAL:** Read and understand the Directive “Cheat Sheet - Delivering a CMA”

___ **6. READ:** Read and understand the Directive, “Completing an Advanced Service Sale”.

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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.

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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 IMC 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