



# MARKETING DIRECTIVE - CONFIDENTIAL

Revised September 21, 2024

## SELLING A CMA – Instant Hat

**Note: This is an “Instant Hat” and used to get someone trained enough to start presenting.**

Do the following actions **in sequence**. After each action is done with complete comprehension, check it off by initialing.

- \_\_\_\_\_ 1. READ:** Read the About and Reviews pages on ExpansionSupportServices.com, including watching the videos and reading every testimonial.
- \_\_\_\_\_ 2. READ:** Read and understand the “Business Categories to Target”.
- \_\_\_\_\_ 3. READ:** Read and understand the “Appointment Setting Script”
- \_\_\_\_\_ 4. DRILL:** Read 3 times aloud each of the listed Questions and their Answers.
- \_\_\_\_\_ 5. DRILL:** Go to Spotlight Stories tab at CountyAdvisoryBoard.com. Copy the first and last name of the person that is first on the list, currently Kris Greiwhan. Open a new tab and paste it into a Google search and observe where the County Advisory Board article shows up in the search, especially in relation to his Linked In and Facebook.
- \_\_\_\_\_ 6. READ:** Read and understand the “Producing & Editing a Spotlight Story on the County Advisory Board (CAB) Website”
- \_\_\_\_\_ 7. PRACTICAL:** Enter a practice business into the County Advisory Board website at <https://countyadvisoryboard.com/spotlight-input/>.
- On the CountyAdvisoryBoard.com website, enter the practice business name into the hourglass search bar top right and locate the company you just entered. Read the story.
- \_\_\_\_\_ 8. PRACTICAL:** Make a few edits to the story. Save the edits and review your changes.
- \_\_\_\_\_ 9. READ:** In the ESS website’s navigation bar, click on “Start” and study this page.



\_\_\_ **10. PRACTICAL:** At the bottom of the Start page, complete the form using made up business data, but use your personal email address in the client's email tab. Go to your email and find the completed order form so you can see what the client will receive.

\_\_\_ **11. PRACTICAL:** Watch the 2 minute video "Why a CMA is Helpful" 3 times:  
<https://www.youtube.com/watch?v=ubhx9dOGL8k&list=TLHQMTIxMTIwMjPQAzcgL0aVjw&index=3>

\_\_\_ **12. READ:** Read and understand the Directive, "Closing CMAs Process".

\_\_\_ **13. PRACTICAL:** Get a checkout by the Trainer ensuring you know the words in this Directive, understand the concepts and can apply the data in "Closing CMAs Process."

\_\_\_ **14. DRILL:** Repeat the below bullet points **loud and proud** until you can state the below bullets conceptually (not verbatim) without looking. Get a checkout by the Trainor.

- *Build rapport by asking light, non-thinking type questions*
- *Discuss client's business goals*
- *Discover a problem, barrier, or dissatisfaction*
- *Is it really a problem?*
- *What effect is the problem having on the business, client personally or their family?*
- *Propose the Competitive Marketing Analysis as a solution to the problem and its effects.*

\_\_\_ **15. READ:** Read and understand the Directive Pre-Game.

\_\_\_ **16. Practical:** Do a Pre-Game for an appointment.

\_\_\_ **17. READ:** Read the Directive "CMA Intro Pitch – Client Does Not Show Up in Searches"

\_\_\_ **18. DRILL:** Repeat each of the 6 parts, one at a time and not all together, **loud and proud** until you can state each conceptually (not verbatim) without looking. Get a checkout by the Trainor after each section.

\_\_\_ **19. DRILL:** Role play the Client Does Not Show Up and Lost Revenue Close with the Sales Manager or one of the assistants to the Sales Managers until you feel comfortable



\_\_\_\_\_ **20. READ:** Read the Directive “Transition: Spotlight edits to CMA Presentation”

\_\_\_\_\_ **21. Practical:** Write an essay discussing the purposes of the Spotlight edit and the BCs biggest mistake. Describe how you can use fulfill the purposes and not make this mistake.

\_\_\_\_\_ **22. READ:** Read and understand the Directive, “Completing a CMA”.

\_\_\_\_\_ **23. DRILL:** Do each step, or pretend to do each step of Completing a CMA and ensure there are no confusions.

\_\_\_\_\_ **24. PRACTICAL:** Work out your communication lines including your company email address, your Nextiva Phone, headset, texting, how to transfer calls, and how to use the screen sharing feature with Nextiva. You can also use Whereby or Join.me. Get help from your Trainer as needed.

\_\_\_\_\_ **25. PRACTICAL:** Observe a Spotlight Presentation being done by a trained Business Consultant.

\_\_\_\_\_ **26. FINAL PRACTICAL:** Work with another Business Consultant and go through the entire sales process, including writing the story, edits, getting them onto screen sharing, building rapport and closing them on the CMA.

**YOU ARE NOW READY TO MEET WITH PROSPECTS, PRESENT, & CLOSE!**

\_\_\_\_\_ **27. START:** Start doing Spotlight Appointments. If you do not have a scheduled appointment, contact our past Spotlight prospects where the presentation did not occur.

\_\_\_\_\_ **27. CONDITIONAL:** **After** you close a CMA(s), do each action contained in the Directive “Completing a Sale”.

\_\_\_\_\_ **28. READ:** Read the Directive **Business Consultant Weekending Administration**.

\_\_\_\_\_ **29. PRACTICAL:** Complete a test BC Weekly Report and log into Meta Pulse and ensure you understand what is asked for and how you'll get the data.

**COMPLETION:** Once you have closed 3 targeted businesses on our CMA services within a 3 day period using our Spotlight Story Process (not your mom, dad and brother), you have passed and completed this training program. You must be able to close 1 CMA per day to be considered trained on this hat.



## SALES DIRECTIVE - Confidential

September 21, 2024

### Business Categories to Target

When prospecting, some business categories are easiest to set appointments with, some easiest to close on CMAs and some best to close on becoming active customers. We do not service businesses that do harm, in our estimate, to society or people.

Here are three types of businesses with examples that we are most successful with:

**Recurring Revenue Services** – A few new customers cover our recurring fees.

- Swimming Pool Services
- Pest Control
- Dentists, Veterinarians, Chiropractors

**High Ticket (\$500+) Services** – A few customers during the year covers our yearly fees.

- Auto Collision, Dent and Bumper Repair
- Tree and Stump Services
- Pool Builders
- Moving Companies – Independent
- Plumbing, HVAC, Electric
- Home Remodeling, Painters, Drywall
- Roofing – Commercial and Residential
- Semi-Truck Repair & Truck Mechanical and Engine Repairs
- New Windows, Window Replacements, Shutters & Glass Services

**Emergency Services** – Their customers find them online and order immediately.

- Locksmiths
- Towing



Here is an approved list of business categories to contact with the **best** categories in red:

#### Home Improvement Services

- Air Conditioning Sales and Service
- Animal Removal
- Carpet cleaners
- Concrete and Asphalt Companies
- Deck Companies, Sea Walls
- Electricians
- Excavating
- Fencing services
- Flooring repair, installation
- Foundations services
- Garage door services
- General contractors
- Gutter cleaning, installations
- Hardscape, retaining walls, patios
- Home Builders – New
- Home Builders – rehabilitation, remodeling, renovations and additions
- Home security, home theater services
- Home Siding
- House cleaners
- **Heating and Furnace Companies (HVAC)**
- Landscapers
- **Locksmiths**
- Mold remediation
- Pest control
- Plumbers
- Pool cleaners & pool builders
- **Roofers – Residential and Commercial**
- Sewage & drainage system services
- **Tree services, removals, stump removals**
- Water damage services
- Window cleaners & repair
- **Window replacement, new windows**

#### Business Services

- Accountants, Tax, & Bookkeepers
- **Auto Body Repair**
- Auto Glass Repair, Replacement & Tinting
- Auto Mechanical Repair, **Transmissions**
- Event and Wedding Services
- Insurance – Independent Brokers
- Lawyers, Attorneys
- Limousines, Air/Sea Charters, etc.
- **Moving Companies**
- Printers, Screen Printing, Awards
- **Semi Trucks Repair, Engine, Mechanical**

#### Personal & Healthcare

- Chiropractor
- Day & Medical Spas
- **Dentists**, Orthodontists
- Dermatologist
- Doctors, Urgent Cares
- Massage Therapists
- Ophthalmologist, Optometrists (eye docs)
- Pet boarding
- Physical Therapist
- Podiatrist
- Tattoo Studios
- **Veterinarian**

#### Retail services

- Clothing, Shoes, Tuxedos/Dresses
- Furniture, Lighting, Cabinets
- Pizza
- **Restaurants – Steak**
- Restaurants – Italian, Seafood, Breakfast
- Sports Bars



# Lead Generation Script

## OPENING

Good(morning/afternoon). My name is \_\_\_\_\_ and I am calling from Expansion Support Services on behalf of the County Advisory Board website.

We're reaching out because we are doing a FREE spotlight article on you and your business. I just need to speak with one of the owners for a brief phone interview.

*Note: Repeat the opening to the owner if the person you were speaking with is not the owner.*

## Start asking questions and add the contact to HR (New Business)

- How long have you been open, or what year did you open the business?
- What is your best service?
- The correct spelling of your business name is....
- And please spell your name for me...
- Are you trying to expand your business...
- What is your company's website address?
- And are you located as (address)

## SETTING THE INTERVIEW APPOINTMENT – Add the Immediately Start the Online Form

Now, our consultant is going to interview you, then create the Spotlight article. When its done, you'll get a chance to make edits and approve it.

What is good time tomorrow when you can set aside 15-20 minutes to be interviewed so we can complete the article?

Great. You'll give the consultant your approval, they will get the story published and show you how the general public can locate it online.

Once done with the story, the consultant is going to tell you about Expansion Support Services, the company that owns and manages the County Advisory Board website, let you know what services we provide, and how we help companies in your industry get more customers.

Should the consultant call you on \_\_\_\_\_ (phone number) at \_\_\_\_\_ (repeat time)

What is your email address?

**Last question, you do want this Spotlight Story done on your business and you are willing to give our consultant 15 minutes to introduce company, Expansion Support Services, correct?**



## QUESTIONS AND ANSWERS....

**1. What is the County Advisory Board?** It's a website that was created to promote positive stories about businesses and their owners.

We reach out to businesses and offer these FREE articles showcasing them and what they do in exchange for getting to introduce our company and services to local businesses.

We then post the articles to the County Advisory Board website. So basically, it's free advertising for you.

**2. What's the catch? or Are you going to sell me something?** After the Spotlight Story is done, we are going to introduce our company, and the services we provide. If you have a need for our services now or in the future, we hope that you consider using our services to assist you in your expansion.

**3. What company are you with?** I work for Expansion Support Services. We own and manage the County Advisory Board website.

**4. How much does the story cost?** We write, edit, publish the Spotlight Story and keep the article posted on the County Advisory Board for a year for free. We do want you to give us us 15 minutes of your time to introduce our company and services.

If you want to keep the free article posted after a year, we'll keep it online for \$20 per year which you can decide in a year.

**5. (For a Phone Appointments) Do I need to be in front of a computer and do a screen sharing for the edit?** Yes. The Consultant will do a screen share with you so that you can see the article and edits made in real time. This saves your time and ours as the appointment can then be done in one phone call.



## SALES DIRECTIVE - Confidential

September 21, 2024

### Producing & Editing a Spotlight Story on the County Advisory Board (CAB) website

#### Produce the Story...

1. Go to CountyAdvisoryBoard.com/spotlight-input/ and complete the form.
2. You can view the story by clicking on the magnifying glass in the top right of the CAB website and searching by the business name or business owner's name.

#### Editing the Story...

3. Log in by going to <http://countyadvisoryboard.com/wp-admin> and enter your UN and PW.
4. In a new tab, locate the story, open the story, and then click on "Edit Post".
5. Click on Purple "Use Divi Builder" box.
6. Wherever you see the word "Text" in a black bar, click on the gear shift to edit the text.
7. When done with your addition or change, click on the green check mark box.
8. To save all changes, click on the button on far right that says "Update" or "Publish"
9. Click on the "Preview" tab if you want to see your changes.
10. Post the URL to the completed story into HR. Note... if the URL is from "Preview Mode", copy the URL from left to right but do not include anything including and to the right of `?preview_id...`
11. After you go over the story with the prospect and any requested changes are made, email the stories URL to the client.

The biggest mistake Business Consultants make is to over emphasize the importance of the story. The BC puts too much time and attention into writing, editing and spending time with the client. This Spotlight Story is a free service is a nice PR piece for the client. If the BC spends the majority of the client's time discussing the story, they are taking time away from closing the client on a CMA or other service. Do not spend more than 5 minutes editing or correcting a story.

Use the story to get into communication and build rapport with your prospect. Once rapport is done, end the story and move into the sales cycle.

Kurtis  
President



# MARKETING DIRECTIVE - CONFIDENTIAL

July 23, 2019

## CLOSING CMAs PROCESS

### Transition: COUNTY ADVISORY BOARD

- A. Meet with or screen share with the client using join.me or another screen sharing software.
- B. Go over the Spotlight building rapport and make any changes needed.
- C. Before, during and after the Spotlight, go through communication steps 1-6 below.

### 1. BUILD RAPPORT BY ASKING LIGHT, NON-THINKING QUESTIONS – Relationship Building

- PROSPECT: The prospect needs to communicate – what are their hobbies/interests? Married/kids? Ask about pictures on their wall or perhaps something on a shelf or desk.
- YOU: Who are you and why should they let you into their business?
- EXPANSION SUPPORT SERVICES: Discuss we've helped businesses since 1992, over 30 years and have worked with small companies, medium sized, and the largest companies in the world, including Bonefish Grill, Tootsie Roll, and Hearst Media which owns Cosmo Magazine and Men's Health.

### 2. DISCUSS BUSINESS GOALS THE PROSPECT WANTS TO ACHIEVE

- How many staff
- How many locations
- How many customers? New customers?  
Capacity?
- Products and services offered
- Benefits of client's services
- Annual revenues now? Ideal?
- What do they want to accomplish?

### 3. GET THE PROSPECT TO DISCUSS A PROBLEM, BARRIER, OR DISATISFACTION WITH THEIR BUSINESS

Our products help solve...

- Not enough money
- Not enough new customers
- Credibility is lacking
- Not enough time
- Out of communications with existing customers
- Uneducated, embarrassed about marketing
- Confused, too many advises and opinions
- No leads being generated from the internet
- Web presence can't be found, unless name is specifically typed in
- No visitors to website or visitors are not converting into money
- Time suck
- Poor marketing return on investment (ROI)



#### **4. IS IT REALLY A PROBLEM?**

- Did the customer verbalize the problem?
- Is the problem real to the customer? Does he agree that it is a problem?
- To what degree is it a problem for the customer?

#### **5. EFFECT OF PROBLEM?**

- What effect is the problem having on our client's business?
- Is the problem having an effect on the client personally or the client's family?
- What is the future version of the effects if the problem is not resolved?

#### **6. PROPOSE THE CMA AS A SOLUTION TO THE PROBLEM, BARRIER OR DISATISFACTION**

**Is the client open to hearing about a solution to XYZ problem?**

Our Competitive Marketing Analysis will help discover the cause and provide solutions to totally handle XYZ problem.

**FEATURES... Here is what a Competitive Market Analysis contain.**

**A. Educate**

Our intention is to educate! We want our clients to fully understand how online marketing works (or why it's not working) so they can be successful using the internet to expand. This helps the business owner make the best decisions.

**B. Research**

- a. Complete analysis of the computer code of your website – what was done right or wrong
- b. Analysis of the marketing and functionality of your website.
- c. Analysis of your online competitors – those winning the search engine wars
- d. Market research – what are people typing into the search engines.

**C. Strategic plan**

- a. Bright ideas.
- b. The Plan - If you are going to build a house, better have an architectural plan. If you are going to expand using the internet, planning should be done BEFORE anything else.

**D. Solutions**

- a. Specific recommendations on what to do and in what sequence
- b. Prioritized into Extreme Priorities, High Priorities, Medium Priorities and Low Priorities

**E. Consultation with 2-way communication to enlighten the client on research, marketing basics and recommendations.**



## **SALES DIRECTIVE - Confidential**

**September 21, 2024**

### **Pregame**

- 1) Review the client's website looking for sales opportunities and any notes in Highrise.
- 2) Review the Spotlight Story, print and take a copy with you.
- 3) Create a brief ranking report, like the sample below on Company letterhead, which you will hand to the prospect at the appropriate time.
- 4) Open tabs on your computer you intend to use. CAB, Spotlight Story, client's website, a Google search showing the client does not show up, etc.

### **JOE'S CHIRO CARE**

**JoesChiroCare.Com does not show up  
on Page #1 in Google for:**

- **Clearwater Chiropractors**
- **Clearwater Back Pain**
- **Clearwater Headaches**

**Note: Your Google My Business (GMB) profile may show up in Google Maps. This brief ranking report is based on your website's rankings, not your GMB profile.**



## SALES DIRECTIVE - Confidential

September 21, 2024

### CMA INTRO PITCH

### CLIENT DOES NOT SHOW UP IN SEARCHES CLOSE

1. When I was researching your company, I noticed that you do not show up in a Google search for \_\_\_\_\_. Did you know you didn't show up for \_\_\_\_?
2. We have a product that I think can help you. It's only costs a one-time \$35 and comes with a 100% money back guarantee. Can I tell you about it? (*get an affirmative answer before moving on*)
3. You are losing potential customers and money because you don't show up on the internet for some important terms people searching on Google.
4. We will figure out why you are not showing up. We have very smart, and a bit nerdy, guys that will review your computer code and see what's wrong. That will figure out why you aren't showing up and also will investigate your competitors to see what they are doing that you are not doing.

Once they figure out why you are not showing up, our technicians will prepare recommendations for you, your web guy or for us to fix any issues discovered. I will then do a consultation and training meeting with you so you know exactly what we found, what needs to be done, and how to dominate the Google searches in your area.



5. Specifically, here's what we're going to do...

- Website's Computer Code – we'll figure out why you don't show up.
- Competitor's Analysis – we'll do intel for you figuring out what the guys that are showing up are doing.
- Salesmanship Analysis – If clients come to your site, will they become a lead or sale?
- Market research – we'll see what your prospects are typing in when they are searching. For example, in Chicago people say "car repair" and in Florida they say "Auto Repair". To a computer those are two different phrases.
- Prioritized list of recommendations – a prioritize list of specific recommendations that will increase your firm's income.
- 1-2 hour consultation – we'll provide you with all the data we've found and give you our suggestions on how to proceed.

6. As mentioned, the cost is only \$35. I'm ready for your credit card number.

(Get the payment or handle considerations or objections and then get the credit card)



## SALES DIRECTIVE - Confidential

September 21, 2024

### TRANSITION: SPOTLIGHT EDITS TO CMA PRESENTATION

## THIS IS THE MOST IMPORTANT DIRECTIVE IN THIS CMA SALES TRAINING

**The Spotlight Stories are to 1) build rapport, 2) find a problem, 3) turn the prospect into a customer.**

1. Pre-Game Prep: A) Review the Spotlight Story, B) Check out the client's webs presence, C) Find Geo-Keywords they do not show up in searches and create a document on letterhead, and D) Add story URL and any other notes into Highrise.
2. Greet the client & remind them who you are. Get the client to share your screen.
3. Give the client an overview of what is about to occur and get their agreement on this.
  - a. "I'll give you some info about the County Advisory Board and how the article is helpful"
  - b. "I'll be asking you some questions so I can enhance the story."
  - c. "We'll go over the rough draft and make any changes and additions."
  - d. I'll then introduce Expansion Support Services and our services.
4. Enlighten the client on the County Advisory Board and how it can act as a 3<sup>rd</sup> party endorsement. Show the client how the story can help the client when prospective customers are researching them. If you have a computer or the client is at his computer, use one of the Spotlight Stories for this demo (Kris Grienwahn).
5. Begin your edit. Ask questions to get them talking which will build rapport. Ask how they got into their line of work, how they were trained, ask about their hobbies, any time of associations, awards they have won, and how they help their community. Keep asking questions till you have rapport, then speed read through the remainder of the story.



6. During the Story there is a place to add the client's email and phone number. Inform the client, "I will only add your email and phone number if you are taking on new customers?" Then ask, "Are you taking on new customers?"
7. ENSURE THE CLIENT HAS GIVEN YOU SOME CLUES TO POTENTIAL PROBLEMS.
8. GET THE CLIENT TO DISCUSS A BUSINESS PROBLEM, DIFFICULTY, or ANNOYANCE.
  - a. Can take on more customers, thus not at capacity nor maximizing income potential
  - b. Not making enough money
  - c. Not showing up in searches
9. Present our CMA as a solution to not showing up, or whatever problem you discover.

10. Close the client on the CMA.

Kurtis



## **COMPANY DIRECTIVE - CONFIDENTIAL**

**Rev September 21, 2024**

### **Completing a CMA Sale**

**Do the following steps in the exact below sequence.**

#### **DO WHILE WITH THE CLIENT WHILE ON THE PHONE...**

1. Payment – Get the credit card from the client and process the payment while the client is on the phone. Charge the client at <https://expansionsupportservices.com/35cma/>

If the client does not want to give you his credit card but wants the service, have the client go to the above link and do the payment while you stay on the phone with them.

2. Add the credit card information, authorization, and charged amount into HR in a note that only the Highrise group “Treasury” can access.
3. Interview the client and add the requested information to the online Order form at ExpansionSupportServices.com/cma
4. Set the exact time and date to deliver the CMA within 2-5 business days choosing a time that all influencers and those that must be consulted on financial decisions will be at the CMA delivery. The client needs to be at a computer with internet and dedicate about an hour for this meeting.
5. Reconfirm the new CMA Delivery Consultation appointment ensuring the client has the date and time written down in their calendar or whatever they use to organize their schedule.



## IMMEDIATELY AFTER YOU COMPLETE THE CALL...

6. You will receive a copy of the online order form in your email. Copy and paste it into Highrise. If there is a PDF version, download that and upload it into HR as well.
7. Generate a 100 Geo-Keyword list at [TopTal.com/marketing/mergewords](http://TopTal.com/marketing/mergewords).

Post the keyword list into Highrise. The geography should be the 5 or so surrounding towns with populations of at least 4,000. The 20 or so keywords should cover the business category (ex. Chiropractors, Chiropractic Services, etc.), symptoms/problems (ex. Back pain, knee pain, headaches, etc.) and services (nutritional testing, chiropractic adjustments, massage, etc.)

8. Add into a HR note any other data you feel you or the person producing the CMA needs or may find useful. Too much data is better than not enough.
9. Edit/update the client's Highrise profile so that ALL tabs that can be filled out are filled out. For example, change the customer status to, "New Customer – CMA or SBA", web address is added, etc.
10. Tasks created in Highrise ensuring the task "categories" match the description of the task below.
  - a. Set a task for you or Sales Services to produce the CMA 24 hours before the delivery date. Your Manager will let you know which ESS staff is Sales Services.
  - b. Sets a task for the BC to text an appointment confirmation 24 hours in advance of the CMA delivery. If the client does not respond, call and confirm.
  - c. Sets a task for you or another BC to delivery the CMA.

Kurtis Kintzel  
President



## **SALES DIRECTIVE - Confidential**

**September 21, 2025**

### **Business Consultant Weekending Administration**

At the end of each week and no later than 5:00 PM US EST, you'll enter your Weekly Report into <https://expansionsupportservices.com/BCWeeklyReport>.

This Weekly Report is hyper-linked in the footer of the ESS website.

Every Friday, Appointment Setters enter your weekending stats at <https://metapulse.com/>. Get your UN and PW from Human Resources. The requested stats will show up in a data entry screen. , Number of New Appointments Set and Number of Presentations Done from Appts Set into the ESS stats program at:

Kurtis Kintzel