



MARKETING DIRECTIVE - CONFIDENTIAL

Feb 3, 2026

SELLING A CMA – Instant Hat

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

PART 1 – The Basics

____ 1. **READ:** Read the About page on ExpansionSupportServices.com.

____ 2. **READ:** Watch the two videos and read the testimonials on the Reviews page on ExpansionSupportServices.com.

____ 3. **WATCH:** Watch the “Online Strategic Planning” Video at:
<https://www.youtube.com/watch?v=YUXj6joc0Us>

____ 4. **READ:** Study <https://expansionsupportservices.com/cma/>

____ 5. **PRACTICAL:** At the bottom of the CMA 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.

____ 6. **WATCH:** Watch the Video: <https://www.youtube.com/watch?v=kEx3fCVUy44>

____ 7. **PATTER DRILL:** Repeat each of the 6 features of the CMA **loud and proud** until you can state each conceptually (not verbatim) without looking. Get a checkout by the Trainer.

- Website’s Computer Code
- Competitor’s Analysis
- Salesmanship Analysis
- Market research
- Prioritized list of recommendations
- Consultation to go over the research, strategy and recommendations



___ **8. PRACTICAL:** Watch the 2 minute video “Why a CMA is Helpful” as many times as you like paying attention to the presenters tone, confidence, command:

<https://www.youtube.com/watch?v=ubhx9dOGL8k&list=TLPQMTIxMTIwMjPQAzcgL0aVjw&index=3>

___ **9. READ:** Read and understand the Directive, “Closing CMAs Process”.

___ **10. 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.”

___ **11. 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 CMAs as a solution to the problem and its effects.***

___ **12. 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.

___ **13. 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.

___ **14. READ:** Read the Directive “Editing the Spotlight”

___ **15. PRACTICAL:** Make a few changes to your practice business Spotlight, save and view the changes online. Do this another time or two until you know how to make changes to a Spotlight Story.



___ **16. READ:** Read and understand the Directive, “Completing a CMA”.

___ **17. DRILL:** Go to: <https://expansionsupportservices.com/95cma/> If you want to see what the client is going to see, you are welcome to do a test CMA using your credit card. If you do, ESS will Zelle you back the \$95.

___ **18. 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.

Do an a Spotlight Story edit using screen share with your Trainer. This is not the entire presentation, just get used to using your tools, screen share, editing a story, etc.

PART 2 – Presentations

___ **1. PRESENTATION PATTERN DRILL 1:** Repeat loud and proud the following lines until you recite each phrase verbatim without looking.

- A. “I can add your phone number into the story but I only want to do that if you are taking on new customers. Are you taking on new customers?”
- B. “Hmmm... I think I have a solution for that. It only costs a one-time \$95 and comes with a 100% money back guarantee. Can I tell you about it?”
- C. “I want our tech team to research this and create a strategy to help you _____”
- D. “If you don’t think its worth it, I’ll give you your money back. Can I tell you about it?”

When you can recite each one of these without looking, get checked out in each of the four one at a time by your trainer. These are passed when you can recite them verbatim.



____ **2. READ:** Read the Directive “CMA Intro Pitch – Wants More Customers”

____ **3. PRESENTATION PATTERN DRILL 2**

1. We have an introductory product that I think is perfect for you.
2. It's called the competitive market analysis.
3. It's only \$95 and comes with a 100% money back guarantee, no questions asked.
4. Can I tell you about it? (*continue if a yes, or end of a no*)

____ **4. PRACTICAL:** Role play the “Wants More Customers” presentation with your trainer, Sales Manager or one of the assistants to the Sales Managers until you feel comfortable.

____ **5. READ:** Read the Directive “CMA Intro Pitch – Lost Revenue Close”

____ **6. PRESENTATION PATTERN DRILL 3**

1. Now when we were editing the story, you mentioned you are accepting new customers. How many new customers can you take on in a week?
2. What does, on average, a new customer spend with you?
3. So _____ (*how many more customers in a week*) X \$_____ (*average revenue*) indicates you are missing out on about \$_____ per week.

____ **7. PRACTICAL:** Role play the “Lost Revenue Close” presentation with your trainer, Sales Manager or one of the assistants to the Sales Managers until you feel comfortable.

____ **8. READ:** Read the Directive “CMA Intro Pitch – Does Not Show Up”



___ 9. PRESENTATION PATTERN DRILL 4

1. When researching your company, I noticed that your website doesn't show up on page 1 of Google for _____ (city) _____ (keyword).
2. I'm talking about your website showing up in a Google search, not your Google listing in Google Maps.
3. Your website should show up in a Google search for _____ (city) _____ (keyword).
4. Did you know it doesn't? (*You can show client by doing an online search in front of client*)
5. There is something wrong with your website.

___ **10. DRILL:** Role play the "Does Not Show Up" presentation with your trainer, Sales Manager or one of the assistants to the Sales Managers until you feel comfortable.

___ **11. READ:** Read the Directive "Transition: Spotlight edits to CMA Presentation"

___ **12. PRACTICAL:** Role play the process with your trainer until you are comfortable.

___ **13. PRACTICAL:** Scan everything you have studied in this training and count how many times the terms "SEO", "Search Engine Optimization", "E-Commerce", and "Google Ads", have been used. Report the number to your trainer.



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

EDITING THE SPOTLIGHT

Make edits while speaking with the client
or take notes and do the edits after you meet with the prospect.

1. If the story does not exist, go to CountyAdvisoryBoard.com/spotlight-input/ and complete the form.
2. Log in by going to <http://countyadvisoryboard.com/wp-admin> and enter your UN and PW.
3. Open a new tab, search by the name or business. Click on the title, click again to go to the full story.
4. See the "Edit" tab on the top of your screen. Click on it and edit or add to the story. Have your trainer show you how to edit the story within the website.
5. Once done, click on the PUBLISH if a new article or UPDATE if the story already exists to save changes.
6. Click on the "Preview" tab if you want to see your changes.
7. Post the URL to the completed story into HR. After your appointment and any edits requested/made, email the story's URL to the client.



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 at expansionsupportservices.com/charge {or /95cma or /20cma or /35cma}

2. Add the credit card information, authorization, and charged amount into HR in a note that only Kurtis, Mimi and the Treasury Manager {check the Org Board} 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.

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. Check the Org Board for who this staff member is.
- 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 a Business Consultant to delivery the CMA.

Kurtis Kintzel
President



SALES DIRECTIVE - Confidential

Feb 3, 2026

CMA INTRO PITCH – Wants More Customers

1. *{During Story}* I can add your phone number into the story but I only want to do that if you are taking on new customers? Are you taking on new customers
2. “The World Can Use More Good News” *{End of Spotlight}*
3. Before I tell you more about our company and our services, you mentioned you can take on more customers. How many ore customers can you service in a week?”
4. When I was researching your company, I noticed that your website doesn’t show up in a Google search for _____. Did you know you didn’t show up for _____?
5. Hmm... I think I have a solution for that. It only costs a one-time \$95 and comes with a 100% money back guarantee. If you don’t think its worth it, I’ll give you your money back. Can I tell you about it?
6. “I want our tech team to research this and create a strategy to help you _____. It will take them a couple days to do the research and come up with the best strategy to handle _____. In a few days once they are done, I will do a consultation with you and go over their research with you as well their specific recommendations. If you don’t think their strategy to help you with _____, I will give you your \$95 back, no questions asked.”
7. “Let’s get this research and strategy done. I’m ready for your credit card number.”



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September 21, 2024

CMA INTRO PITCH – Lost Revenue Close

1. can add your phone number into the story but I only want to do that if you are taking on new customers? Are you taking on new customers
2. “The World Can Use More Good News” {End of Spotlight}
3. Before I introduce our firm and our services, you mentioned you can take on more customers. How many ore customers can you service in a week?”
4. What is the average revenue for a customer?
5. So ___ Customers X \$ ___ = \$ _____
6. Then \$ _____ X 4 weeks in a month = \$ _____.
7. So by not being at capacity, you are losing out on \$ _____. Would it help your business to have an extra \$ _____ per month?
8. What would you do with the extra \$ _____?
9. Hmm... I think I have a solution for that. It only costs a one-time \$95 and comes with a 100% money back guarantee. If you don't think its worth it, I'll give you your money back. Can I tell you about it?
10. “We've got a cracker jack, and nerdy, tech team that have helped over 50,000 businesses expand.
11. I want our tech team to research how to help you get more customers and then put a strategy together to help you get more customers. his and



create a strategy to help you _____. In a couple of days once they have researched your case and put a strategy together, I will do a consultation with you and go over with you their research, strategy and their specific recommendations.

12. If after the consultation, you don't think the consultation and strategy to help you get more customers is helpful, I will give you your \$95 back, no questions asked."
13. "Let's do this! I'm ready for your credit card number."



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September 21, 2024

CMA INTRO PITCH - DOES NOT SHOW UP IN SEARCHES

1. Before I introduce our firm and our services, you mentioned you can take on more customers.”
2. When I was researching your company, I noticed that your website doesn't show up in a Google search for _____. Did you know you didn't show up for _____?
3. Hmmm... I think I have a solution for that. It only costs a one-time \$95 and comes with a 100% money back guarantee. If you don't think its worth it, I'll give you your money back.

Can I tell you about it?

4. You are losing potential customers and money because you don't show up on the internet for some important terms people searching on Google.
5. 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.
6. They 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.
7. 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.



8. 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.

9. As mentioned, the cost is only \$95. 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 AN IMPORTANT DIRECTIVE

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 web 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 if you can.
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 3rd 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 can add your phone number into the story but only want to do that if you are taking on new customers? 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