

How to Advocate for Inbound Budget and Upsell Your Existing Accounts



**W H E R E I T
A L L S T A R T E D**

INSERT PICTURE HERE

Hubspot Partner
January 2013

SEO Shop

Clients Dissatisfied

Unprofitable

**1 Account Manager
= 37 Accounts**

Average Retainer
\$800 per month

R I G H T F I T
F O R I N B O U N D

C L I E N T A N A L Y S I S

What is total **MARKETING BUDGET**?

How interested are they in **GROWTH**?

What **VALUE** can we provide?

4 STEP PROCESS

Marketing Audit

Opportunity Analysis

Creative Brief

Proposal

MARKETING AUDIT

39	Do you analyze your results each month so you can continuously improve results?	Yes
40	Do you track your traffic sources?	Yes
41	Do you track which traffic sources convert into leads?	No
42	Do you track which leads convert into customers?	No
43	Do you track the traffic source/marketing campaign for each visitor, lead and sale?	No
44	SEO - down to keyword	Yes
45	PPC - down to campaign/keyword	No
46	Email - by campaign	Yes
47	Social Media - by site	Yes

48 Other campaigns (Online banner, email sponsors)

49 Do you track your social media follower counts/re

50 Do you track comments, inbound links and page v

51

52

53 **Historical Sales vs Growth Goals**

54 Complete the following questions if any of your bu

55 How many active clients who provide recurring m

56 What is the average amount of revenue you rece

57 How many new clients do you acquire per month

58 What is the number of recurring revenue clients

59 What is the average contract length in months of

60 Complete the following questions if any of your bu

61 What is the average amount of revenue you rece

62 How many new project clients do you acquire pe

63 What is your monthly revenue goal?

64 How many months from now would you like to ach

70

Inbound Marketing Traffic Calculator

Data from Evaluation (Beige)	Enter Inputs (Grey)	Calculator results (Orange)	Note: Achievement of desired results is dependent on your company's implementation of the full HubSpot Inbound Marketing Methodology over a period of time. Use this calculator to set goals.
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Step 1	Enter your monthly booked revenue goal. How much new booked revenue do you plan to generate each month?	
	New booked revenue:	\$40,000.00 Enter as a whole number. Example: 5000

Step 2	Enter the % of new revenue needed from inbound marketing. What percentage of this revenue do you need to book from Inbound Marketing?	
	Percentage:	25%

Step 3	What's your average lifetime revenue per customer?	
	Avg revenue per client:	\$288.04 Enter
	Monthly New Customers:	34.7

Step 4	Calculate number of monthly leads needed to support new client goal. What's your lead-to-customer conversion rate? What's your Goal?	
	Lead-to-customer rate:	Current 10.00%
	Monthly Leads Needed*:	347

Step 5	Calculate monthly traffic needed to generate required number of leads. What's your visitor-to-lead conversion rate. What's your goal?	
	Visitor-to-lead Conversion:	Current 7.0%
	Monthly Visitors Needed*:	4,960

GAP ANALYSIS (months): 12

Traffic	Leads	New Customers
Current	1,500	105
Goal	2,314	231
Monthly Increase Needed	68	11
First Month Increase Required	4%	9%
Total Improvement Needed	154%	220%
		331%

RECOMMENDED PLAN: FAST

	Fast	Faster	Fastest
Frequency/Month (Number)	Frequency/Month (Number)	Frequency/Month (Number)	Frequency/Month (Number)
Ongoing Activities			
Attract More Traffic			
- Write Blog Article	10	20	30
- Build Link	3	6	9
- Interact in Social Media	25	50	75
Convert Traffic to Leads			
- Build Offer	1	2	3
- Build Landing Page	2	3	4
- Build CTA	2	6	12
Convert Leads to Customers			
- Build Lead Nurturing Sequence	0.25	0.5	1
- Segment Leads	0	1	2
- Send Email Campaign	1	1	2
HubSpot 1K Contacts	\$300	\$700	\$1,000
Project/Acct Manager	4	8	12
Total Monthly Investment	\$ 2,800	\$ 5,620	\$ 8,600

O P P O R T U N I T Y A N A L Y S I S

NOCATEE OVERVIEW

Master-planned, residential community in Ponte Veda, Florida

Named the fifth fastest-selling master-planned community in the U.S. in 2013


Clearly tracking the visitor to lead to customer conversion

Innovative follow-up techniques via marketing automation

January 2014:
Visitors: 30,682
Leads: 599
Customers: 88

Sept. 2010:
Visitors:
7,000

CREATIVE BRIEF

REQUEST MORE INFO	
MR. APPLIANCE LOGO	800-290-1422 Live Chat
WHY MR. APPLIANCE? SUPPORT STEPS TO OWNERSHIP FAQ BLOG	
	<p>NORTH AMERICA'S LARGEST APPLIANCE FRANCHISE</p> <p><i>This is where we have a couple of sentences (max) that represent the most important info you want your visitors to take away; why should they be interested and where should they start?</i></p> <p><i>Remember, you have a handful of seconds to capture their attention.</i></p>
<p>Ebook CTA</p> <p>"5 THINGS YOU NEVER KNEW ABOUT OWNING A FRANCHISE"</p> <p>LEARN MORE</p>	<p>Map CTA</p> <p>FIND OUT WHERE WE OPERATE. (MAP OF FRANCHISE LOCATIONS)</p> <p>CLICK HERE</p>
<p>Video CTA</p> <p>CLICK TO LISTEN TO JOE'S STORY. LIBRARY OF VIDEOS.</p> <p>WATCH NOW</p>	<p>Take the First Step</p> <p><i>Find out if owning a franchise is right for you. Download our franchise report.</i></p> <p>Name <input type="text"/></p> <p>Email <input type="text"/></p> <p>Question <input type="text"/></p> <p>START HERE</p>
<p>Our Franchisee's Say..</p> <p><i>The industry is strong. You can cut back on discretionary services, but appliances are becoming less of a convenience and more of a necessity....."</i></p> <p><i>- Scott Stewart</i></p> <p>MORE SUCCESS STORIES</p>	
<p>THIS WILL HAVE MORE INFO!</p> <p>Sometimes we call fill in body copy like this Lorem Ipsum and it goes like: Lorem ipsum dolor sit amet, inimicus vulputate eu eam, homero labore audire quo ne, velit.</p>	

P R O P O S A L

Basic	Fast	Faster
Dedicated account manager	Dedicated account manager	Sr. level account management
12-Month marketing strategy	12-Month marketing strategy	Detailed 12-month marketing strategy
2 consultative calls per month	Regular consultative calls (multiple per week)	Regular consultative calls (daily)
Technical support & training	Technical support & training	Technical support & training
Routine keyword analysis	Routine keyword analysis	Routine keyword analysis
1-2 blog articles per week	3 Blog articles per week	4-5 blog articles per week
Social media marketing training	Social media marketing, scheduling, training & analytics	Social media marketing, scheduling, training & analytics
1 weekly marketing email	Regular email marketing (several per week)	Regular email marketing (several/week)
Creation of new offers quarterly	Creation of new offers monthly	Creation of new offers monthly
CTA implementation	Creation & implementation of smart CTA's	Creation & implementation of smart CTA's
Creation of 2-3 landing pages per quarter	Routine creation of smart landing pages	Routine creation of landing pages (A/B testing)
HubSpot management	HubSpot management	HubSpot management
On-page SEO monitoring	On-page SEO monitoring	On-page SEO monitoring
	Off-Page SEO (link building & local SEO)	Off-page SEO (link building & local SEO)
	Visual content creation & marketing	Visual content creation & marketing
	Prospect & lead intelligence	Prospect & lead intelligence
	Smart contact list segmentation	Smart contact list segmentation
	Salesforce.com integration	CRM integration
	Regular competitive analysis	Regular competitive analysis
	Quality lead identification statement	Quality lead identification statement
	Creation of buyer personas	Creation of buyer personas
		Press release marketing
		Management of a PPC campaign
		Video marketing
		Branding strategy
		Customized workflows
		Advanced lead nurturing
		Custom reporting
		Closed loop reporting
		Marketing cost analysis
\$2,495/month	\$3,995/month	\$5,495/month

WHAT WE LEARNED.....

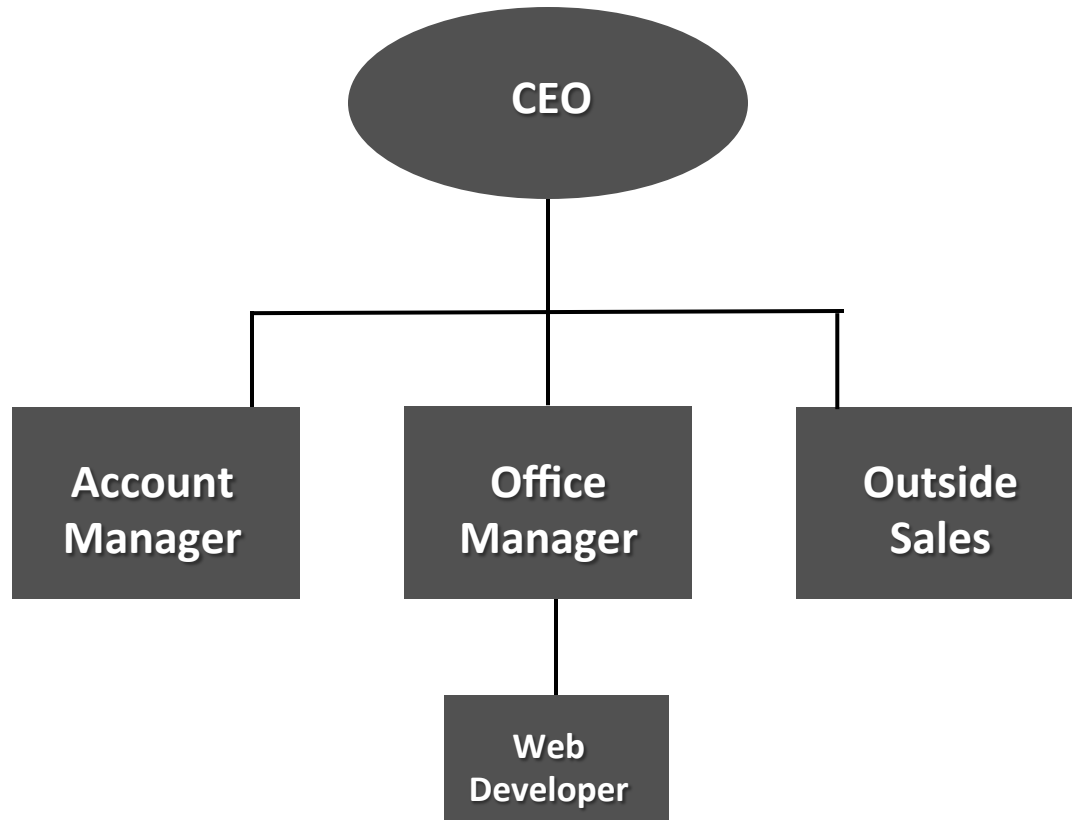
Focus on **PROBLEMS** not **BENEFITS**

Involve **KEY DECISION MAKER**

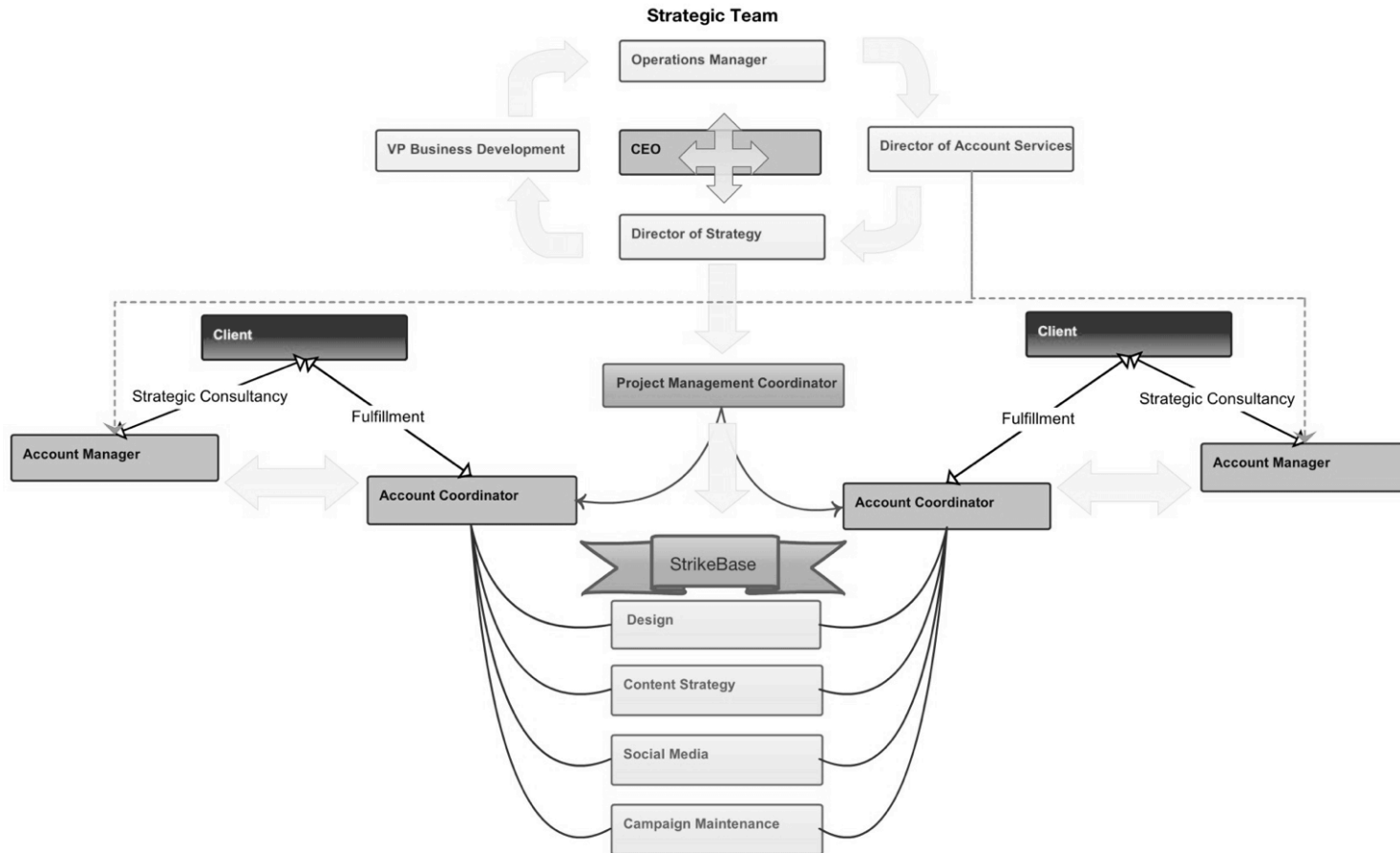
DIFFERENTIATE from Competition

**H O W W E
S T A F F E D**

STAFFING (OLD MODEL)



STAFFING (NEW MODEL)



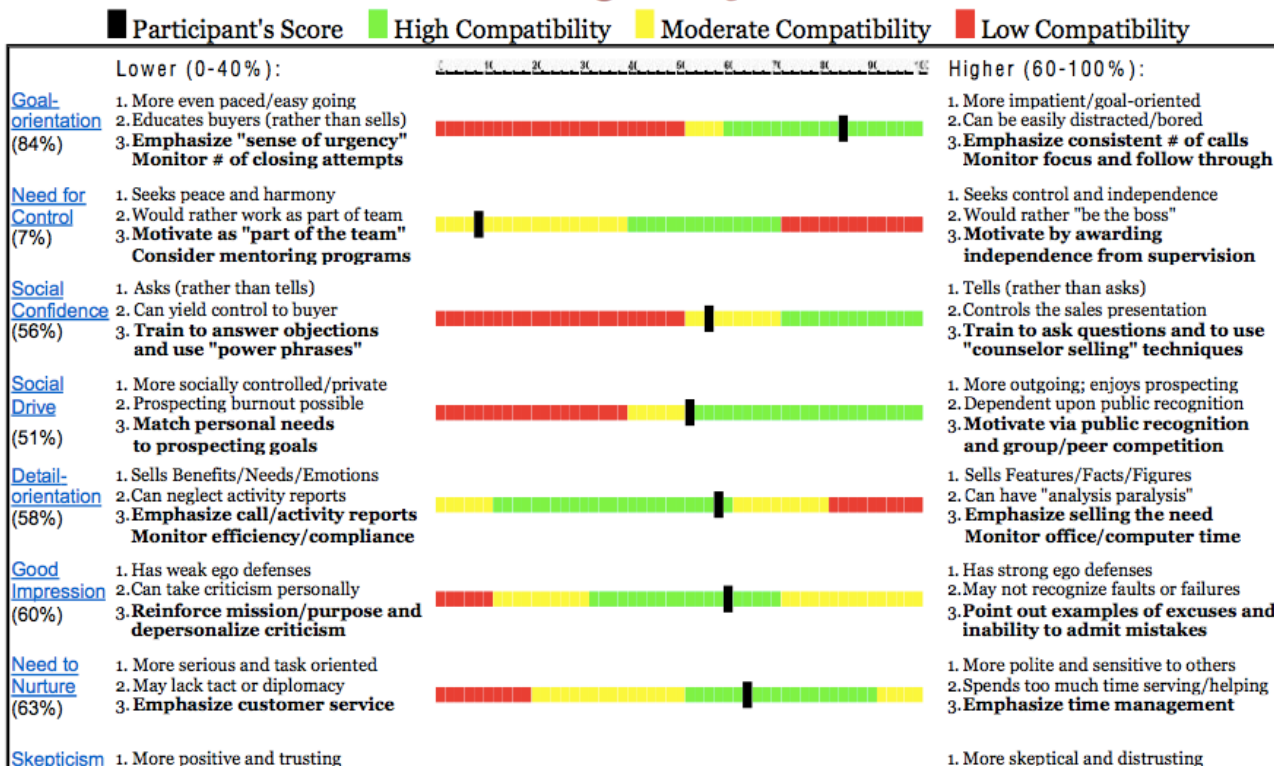
PERSONALITY ASSESSMENT

Participant's Name: Lauren Overby **Date:** March 20, 2013
Position: Account Manager (Farmer) **Compatibility Points:** 46
Compatibility Rating: High **Recommended Coaching Hours:** 2 (per month)

This participant's Recommended Coaching Hours (per month) refers to the total time that could be required by the manager to compensate for incompatibilities relating to this Personality/Motivation dimension of success. These incompatibilities are defined by the distance between his/her scores and the "Ideal Range." For specific Coaching Recommendations click on any of the "Basic Eight" CPQ trait names (see left side of this Chart).

Important Note: The CPQ should never be used as a stand alone assessment to hire, promote, or terminate employees. The CPQ only measures a single dimension, Personality/Motivation. Contact Asher Training at 202-742-6639 if you have any questions.

"Basic Eight" CPQ Traits



WHAT WE LOOK FOR

Critical Thinking Ability

Willingness to Help

Willingness to Learn



P C R P E R K S

The perks of employment.

TOP OF MARKET COMPENSATION

We take other markets into consideration when calculating salaries. We attempt to get as close to national standards as possible. This is particularly awesome since the cost of living in Jacksonville is lower than the average american MSA.

WORK STYLE

We hire for open roles. We want people who can join the team, understand our vision, and grow their role far beyond the base expectations. Our work style supports and rewards experimentation and adaptation, two of our favorite practices.

HEALTH & RETIREMENT

We have great benefits coverage and a 401k, but we also support team initiatives toward environmental, community, and health causes. Further, we try to stock our fridge with a variety of healthy foods and beverages.

ENVIRONMENT

We are a team that regularly spends our non-working hours together. We dig each another. We have a ping pong table, but usually end up drinking wine and playing Cards Against Humanity or going off-site to work / eat / strategize at our favorite restaurants. Weekends? Usually at the pool or crammed into the back of an Uber together.

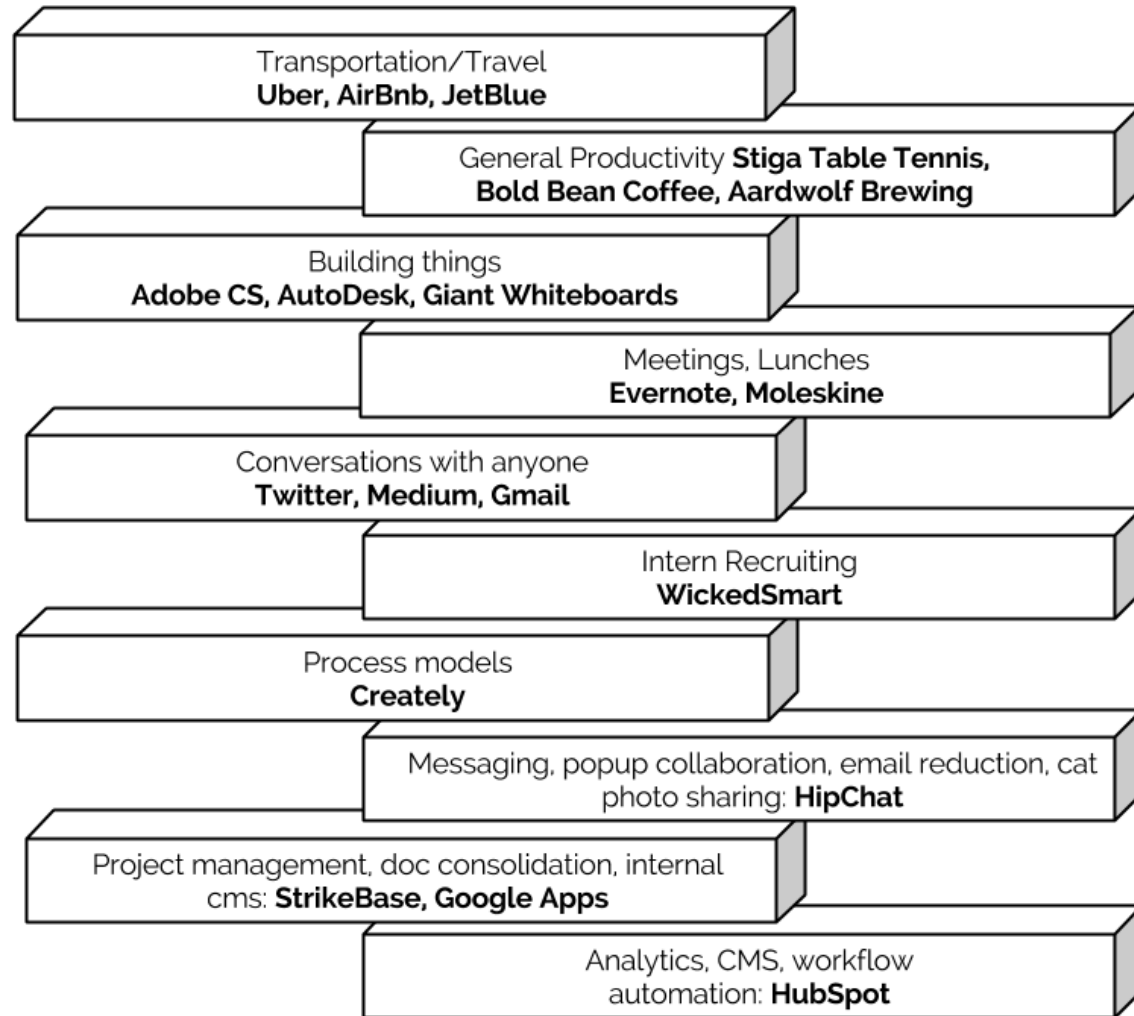
APPLY NOW

TRAINING & EDUCATION

	Essential Skill Matrix						PCRAgency Skill Maturity Profile		
	Basic Skills		Independence and Execution		Complex Analysis and Development		Novelty	Influence	Acclaim
Ability	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5	Tier 6	Tier 7	Tier 8	Tier 9
Research	I can compile client-relevant online, print, and other material research without explicit guidance.	I take compiled material (secondary research and formulate basic hypotheses and suggest testing methods.	I conduct primary research (data collection) using established and vetted methodology.	I can identify significant markers (meaning, correlations) and synthesize them into an actionable report.	I can formulate original methods of conducting primary research.	I engage in complex data analysis to establish significance, validity, and implications of findings.	I can produce original data that results in groundbreaking new findings (novelty).	I originate novel solutions and winning results on the basis of my own data and findings.	I have achieved wide recognition as a master in this practice area (industry awards, large social following, etc)
Communication	When given time for preparation, I can write and speak on with clarity and intelligence.	I can craft a structurally cogent argument in an email (short form), document (long form), or conversation (verbal).	With time to prepare, I can write and speak clearly and intelligently about complex ideas, systems and strategies.	I can maintain productive dialogue with both clients and colleagues that allows me to proactively manage my tasklist far in advance.	I can proactively (without guidance) communicate with clients, prospects, partners, and candidates to generate notably excellent outcomes.	I can consistently present ideas in such a way my point of view is both clear and attractive.	My approach and language are adaptive in real-time and consistently ensure excellent outcomes, regardless of the situation or social dynamic.	I can originate language, styles, and rituals of communication that become part of the cultures I work with.	I have achieved wide recognition as a master in this practice area (industry awards, large social following, etc)
Creation	I can take an idea or concept and express it in a relevant, clear physical product.	Given simple tools (pen/paper) I can create a compelling visualization of my thoughts.	My personal pride is reflected in my attention to detail. I create artifacts that are error-free in letter, fact, and pixel.	I can be independently and entirely responsible for a winning deliverable.	I can synthesize complex information into an inspiring narrative. I can make data compelling to designers, and art theory relevant to mathematicians.	I create artifacts that set new standards and raise the performance bar for the people around me.	I can invent a novel product that expands our engagement and makes our competitors despair.	I can originate an artifact that becomes a standard for the industry. I see examples of my work being replicated in other spaces.	I have achieved wide recognition as a master in this practice area (industry awards, large social following, etc)
Synthesis	I can clearly and dispassionately express my feelings about a topic or situation. I take an evolutionary, rather than dogmatic approach when responding.	I can take information from a wide variety of sources and identify interesting patterns and correlations.	I can look at information and generate insight that is actionable, goal-relevant, and reflects a novel approach to an outstanding problem.	I can create an idea that leads to success in a marketplace (drives results in line with strategic goals).	I can create a functional framework that stimulates the generation of novel ideas and insights.	I can create a framework that becomes fundamental to our clients' business practice and visionary worldview.	I can originate an idea that absolutely crushes in the marketplace (drives a fundamental reexamination of goals)	I can originate an insight that influences and is echoed through the broader culture.	I have achieved wide recognition as a master in this practice area (industry awards, large social following, etc)
Presentation	I can add incremental value with comfort and confidence in meetings, calls or presentations.	I can confidently deliver the meat of a final presentation to colleagues or clients.	I can successfully develop and deliver a presentation independently that yields a winning result.	I can draft a narrative in presenting that compels and wins over clients who might have formerly been resistant.	I can overcome unexpected challenges (or any ilk) during a presentation and transform objections into deeper understanding.	I can lead a room in any context, commanding attention or action without belittling others. I drive my audience to excellence.	I can present to the C-Suite and drive discourse that achieves high-exposure outcomes (move a group away from conservative decision pathways)	I can originate a winning presentation style or technique that is recognized and replicated	I have achieved wide recognition as a master in this practice area (industry awards, large social following, etc)
Strategic Manifestation	I can describe big picture bullet points of how a simple strategy will be executed.	I can take an approved strategy, and with support and minimal supervision, bring it to life.	I can sense and solve an emergent problem in the midst of a complex and quickly moving initiative.	I can take an approved general strategy and execute it in a dynamic and compelling way.	I can manage a dynamic team to be focused and stoked about owning their role in a complex initiative.	I can take a focused initiative as a catalyst for drafting a strategy with a broad organizational impact.	I can take a mandate for overwhelming change and execute against it confidently and successfully.	I can originate a method for actualizing strategy that influences the broader culture.	I have achieved wide recognition as a master in this practice area (industry awards, large social following, etc)

HOW WE OPERATE

Our Ever-evolving Stack

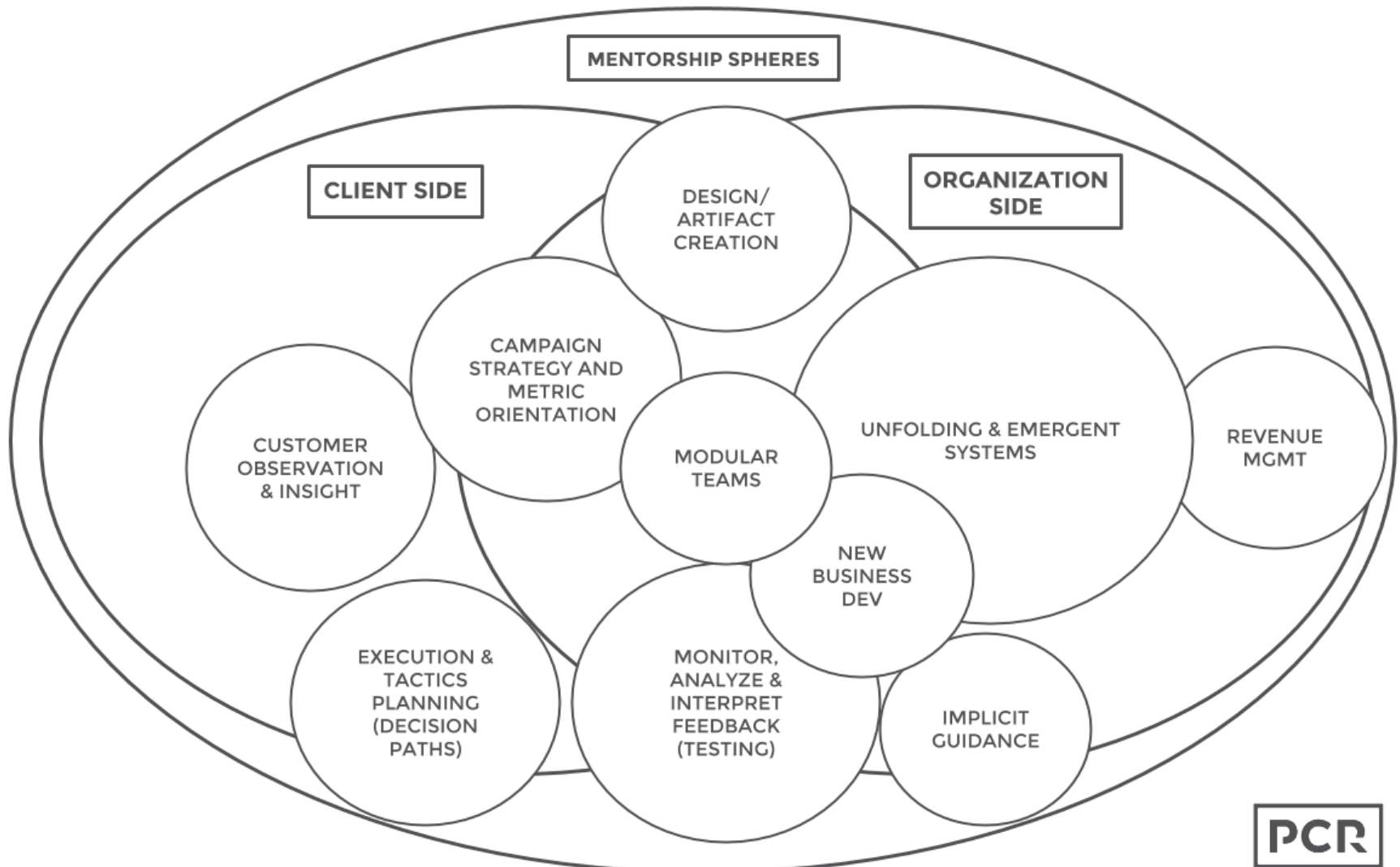




**“The shortcut that’s sure to work
everytime. Take the long way. Do the
hard work, consistently and with
generosity and transparency. And then
you won’t waste time doing it over.”**

Seth Godin

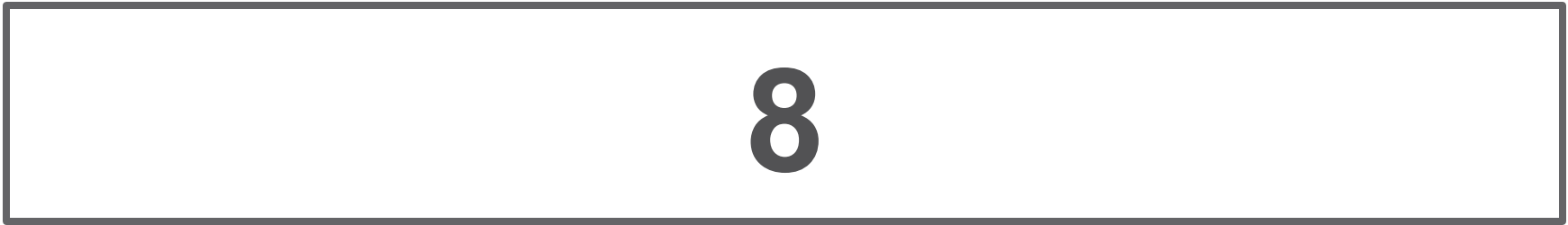
HOW WE FULFILL



A photograph of a paved road winding through a dense forest. The road has a dashed white center line and solid white edge lines. The trees are tall and thin, with green foliage. The text "WHAT'S NEXT?" is overlaid in a yellow box at the bottom center.

WHAT'S NEXT?

\$1.2 Million



\$27,000

M O S T I M P O R T A N T L Y
H A V E F U N

