



Leading Results Statement of Qualifications

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Introduction

To succeed for our clients, Leading Results must collaborate effectively with them. The best collaborative efforts are built on trust, and the origin of trust is transparency. This statement of qualifications seeks to help our clients, partners, and prospective employees understand our history, philosophy, approach to accomplishing work, pricing, services provided, and team.

Unlike many small marketing firms, we have employees, not contractors, who perform most of the work we do for our clients. We invest in those employees – continuing education, benefits, a flexible work environment, etc. – because the best way to reach marketing success is through consistency and continuity, and employee turnover is the biggest disruption to achieving this continuity.

Our approach to services we don't perform in-house is to maintain a short list of vendor partners we closely investigate, monitor, and collaborate with. When our clients need a service we don't perform, we're transparent about the services contracted and managed on their behalf.

Ask someone at Leading Results what we do, and they'll tell you we're a lead generation marketing agency. The best lead generation programs grow from a solid strategy, so we take a very defined approach to strategy. Great lead generation derives from great content, so we have a talented editorial and graphic design staff. For our clients, their website is their "storefront," so we work with the best tools for small and midsized businesses – HubSpot and WordPress.

'Partner' is an overused word in business, so we don't use it here. If you want collaborators who will spend their days (and some nights) thinking about how to help you grow your sales pipeline, make your customers ecstatic, and keep an eye on the future horizon for you, we should be talking.

History

[Dan Kraus](#) founded Leading Results in 2000, after a 10-year sales and marketing career working with software publishers who sold their products through small technology providers.

Leading Results came into being as a fractional VP of marketing services, consulting organization, and outsourced sales team. In the three years it operated in that fashion, Leading Results helped several clients grow their business – but wasn't in a position to grow and scale itself. So, Leading Results was put into hibernation for seven years while Dan ran the national rollout of a small business solution from SAP.

During those seven years of selling to small businesses and working with them, the same story was heard over and over from both the companies that represented the product and those who bought it – "We have talented people and great ideas – but not enough business to grow the way we want."

In 2009, Leading Results was dusted off with a rewritten business plan. It was no longer about doing marketing *for* business owners, but rather working *with* them to build self-sufficiency for

long-term success – but the challenge of *how* remained. Smaller business owners simply couldn't afford to spend marketing dollars on image advertising, creative briefs, and research teams to form their marketing strategies.

To be effective, Leading Results needed to rise to the challenge of creating a repeatable and reusable set of tools to help small business owners cost-effectively implement the marketing they needed. We found the solution in [Duct Tape Marketing](#). With years of marketing and sales experience, Leading Results could have created the tools from scratch – but why not use a proven, documented, and successful system that already exists?

After a few years we started working with Hubspot and the Inbound Methodology to support our duct tape efforts. Since then we have built a number of programs that support growth, create opportunities for successful marketing and change the businesses that we work with.

[HubSpot](#) is our technology platform of choice, and built a team that's both cost-efficient and effective at generating leads for our clients.

In January of 2019, Darling Jimenez who had worked at the company for 5 years became a partner and primary operations manager. Her goal is to drive client success while helping to grow Leading Results to its full potential.

She believes that Leading Results stands out due to its commitment to client success and our focus on data to guide tactics.

About the Company

Leading Results is a North Carolina registered S Corporation; originally, the company was chartered as a Massachusetts S Corporation. We relocated our domestic state of incorporation to North Carolina in 2016.

Our primary offices are at 2139 Supply Court NW, Concord, NC 28027, which is approximately twenty miles from the Charlotte Douglas international airport and sixteen miles from uptown Charlotte.

We typically retain nine to twelve employees and operate our payroll and benefits through a relationship with the PEO firm Group Management Services of Ohio. Leading Results offers a full benefits package to our full-time staff, including health and dental insurance, short-term and long-term disability, retirement plan contributions, life insurance, and paid sick and vacation time. We offer paid maternal and paternal leave policies as well, and although we're not required to comply with FMLA, we choose to do so.

Philosophy

A marketing firm must have a point of view – a basic philosophy that incorporates the beliefs, concepts, and attitudes that it operates with on behalf of its clients, employees, and business partners. A philosophy is bigger than a mission statement.

Marketing as a practice or a profession gets a bad reputation because the question “What is marketing?” has so many answers. Sometimes it's easier to say what marketing is not.

It's not advertising, though advertising is part of marketing.
It's not a website, pay-per-click, or social media, though those are all tactics you can use.
It's not email, telemarketing, or tradeshow, although each of those is a way to reach prospects.

Famed management guru Peter Drucker wrote that a business has only two functions – marketing and innovation. At Leading Results, we agree; other than R&D, everything your company does is marketing. It's how you present yourself and what you stand for (your brand). Marketing is the classic four P's: positioning, pricing, promotion, and placement (how you go to market with your product or service). It's how you package your offerings, which may have to do with your pricing – or it may not. Your marketing approach must be driven by the choices you make to differentiate yourself from your competitors or other choices your customers could make.

In short, our marketing philosophy is to determine your difference and what you stand for and build your marketing strategy from there. Your strategy will encompass your messages of differentiation and value, the systems and approach you must use to codify your difference, and the content necessary to communicate those messages.

Your marketing plan then lays out the measurable tactics used to promote your messages and content to your prospective customers.

How we implement this philosophy with our client work is guided by our core values and our “this is how we do it” statements.

Core Values

The following core values are the guiding principles that dictate behavior and action at Leading Results:

1. We believe in complete **honesty and transparency** in all our communications. There's no room for dishonesty at Leading Results – if something isn't clear, please gain clarity before acting.

In our dealings with others, we ask the hard questions and give the hard – but honest – answers, even if the truth isn't what our clients or employees want to hear. We operate from facts, not assumptions, and all decisions come from facts.

We respect confidentiality. Our clients share information that may not be available to the public, and that information remains confidential. We also respect our employees – when they share information and request confidentiality, we always adhere to that request.

2. We **keep our word**. If we set a date to complete a task, we meet our time commitment. If something slips, we don't make excuses, we take ownership and let people know. When our workloads are heavy, we ask for help when we need it – and there will never be negative consequences for asking for help.

3. We're **process-oriented**. We follow our processes and document new ones. Having processes gives us the freedom to be creative. One of the most important things we do is look for opportunities to innovate for better efficiency for our company and our clients.
4. We're **always getting smarter**. Fail stands for "first attempt in learning." It's ok to try something and have it not work as long as we document our findings and learn from the experience. Continual learning is key to our success. We believe we need to read blogs, take classes, and do what it takes to stay up-to-date in an industry that's always changing.
5. We're **obsessed with client results**. It's not enough to complete activities – we must create results. Our clients' goals are our goals. This is what matters most. If we have done everything we can to get results but are no longer providing value, we will end our relationship with the client.

"This is how we do it"

How we sell:

- We don't make promises we aren't sure we can keep.
- We don't state truths we aren't sure are true.
- We operate from facts.
- We ask the hard questions and don't take the easy answers.
- We make every effort to communicate all aspects of a client's business and goals to our involved coworkers.
- We state a general cost to work with us up front, in our first conversation.
- Wherever possible, we provide a clearly communicated price for a clearly defined scope of work.
- We strive to help you meet your goals in the most cost-effective and unique ways possible.

When we work together:

- We set dates for project milestones and move a reasonable amount of heaven and earth to meet them.
- We don't make excuses when we're late or forget an obligation – we tell the truth about why we're late.
- We keep you involved in the process, but we remember that you hired us to advise you with our best judgment.
- We don't try to turn your business into what we want or think it should be, we help you be better at who you already are.
- We're always clear about what we know as compared to what we suspect, and we communicate that to you so it's clear what we are sure of versus what we suspect may be a result.
- We use the best tools and practices to help you achieve your desired results – not the ones most profitable for us.

How we service:

- We're advisors and consultants. We're expected to add insight, regardless of our role in the firm or with the client.
- We're always learning new things and considering how those things can be applied to our clients.
- It's okay to fail – just do it quickly. We do our best to understand why something failed and communicate honestly with you. We learn from failure.
- The way it's always been done isn't necessarily the right way. We look for opportunities to innovate for better effectiveness or efficiency in everything we do – but we don't innovate for the sake of doing it a new way.
- We are proactive with you. Our goal is to stay ahead of the issues we see coming.
- We expect the partner firms we work with at our client's business to hold many or all of the same values we hold. Vetting partners is crucial, and we feel that poor choices reflect badly on us.
- We respect the confidentiality of our client's business and in what you may tell us personally.
- We'll introduce you to potential partners, clients for you, or other relationships we believe will benefit you, even if there's no financial benefit for us.

How we end:

- Our contracts with you will end, but our relationship with the people at your company will not.
- We don't hold client data or assets hostage.
- We expect to be paid for work performed and we expect contracts made with/through others to be fulfilled. We will allow you to exit future payments to us when you have just cause.
- If we feel we can no longer provide the value you're paying us for, we'll change the contract – or honestly and politely inform you that you would be better served elsewhere.
- We will fire a client who is abusive, unreasonable, or acts with ill will toward our staff – regardless of the value of the client.
- We do not hire staff from you without your explicit permission.
- We will continue, even after the contract ends, to provide you with notes of value or ideas we think will benefit you as time allows.

Clients Served and Locations

Leading Results is particularly well-suited to serve businesses that sell high-value or complex products and services to other business. Examples include technology, environmental services, engineering services, medical devices, and innovative business services.

We consider a sales process to be complex when it is multi-step, has multiple parties involved in the final decision, has complicated messaging, and has a sales cycle longer than six months or a value of \$50,000 or more.

Our team has worked with clients throughout the United States and Canada, Ireland, India, Germany, England, Australia, and South Africa.

We have engaged with more than 400 different businesses since 2009. A sample of our enterprise-level clients includes SAP, Sage North America, SugarCRM, and IBM.

Our SMB clients include:

- Resellers for Sage software (250 resellers across Sage 100, Sage 300, and Sage Enterprise Management)
- SAP Business One resellers
- Microsoft Dynamics resellers (GP, NAV, and CRM)
- Software developers for apps, ecommerce, HRMS, CRM, analytics, industrial automation, and custom applications
- Business services including training and development, telephony, fractional CFO services, accountants, lawyers, and sales development
- Medical services providers including LASIK MDs, skilled care facilities, and home care providers
- Home services providers (carpet cleaning, waste management, remodeling, etc.)

We're often asked if we will work in a way that provides incentives for outstanding work (percentage of revenue). We're always willing to consider the opportunity to share the risk and reward for our efforts; however, as stated above, because marketing is everything you do as a company, we only consider these types of engagements if they're based on overall company revenue over nine months or more.

Success Measurement

Our clients' investment in marketing must have a measurable return. To track and report on this return, we ask that our clients share detailed information about their sales. On every client engagement, we track the overall effectiveness of the website as well as specific campaign or program results. When our clients share sales pipeline conversion information with us, we can report on measurable return on investment.

In addition to the ROI on our work together, we strive to help our clients understand both their cost of acquiring customers and the lifetime value of their customers. When these metrics are clear, the budgeting and measurement of the marketing process are demonstrably easier.

Services Performed

Strategy

- Two- or three-day marketing strategy workshop
- Market research
- Customer surveys and NPS measurement
- Product/service packaging and pricing development
- Online presence analysis and recommendations
- Marketing plan development
- Sales and marketing team integration
- Channel marketing strategy development
- Referral marketing strategy development
- Content marketing strategy development
- Social media strategy development
- Inbound marketing strategy development

Marketing Execution

- Content marketing includes writing, graphic design, and promotion
- Social media execution includes writing, posting, and monitoring
- Paid advertising on social media
- Search engine optimization
- Webinars
- Seminars
- Tradeshow management
- Pay-per-click marketing

- Graphic design (e.g., infographics, sales materials)
- Animated video including storyboard, creation, voiceover, and promotion

Marketing Technology and Automation

- HubSpot - website development, optimization, management, and automation
- WordPress - website optimization and management
- Shopify - ecommerce integration installation and development
- ClickDimensions - marketing automation and management
- Constant Contact - email marketing
- MailChimp – email marketing
- Adobe Creative Suite – graphic design