



## Our Proposal

### Situation Appraisal


Joe Mauro owns Hunterdon Hills Financial and wishes to create a marketing system that will generate new clients in perpetuity, while giving him the ability to predict future client volume, and revenue, with laser-focused ad targeting at new prospects already in-market for his diverse stable of financial planning services.

### Objectives ([Learn More](#))

- **Milestone 1:** Complete initial analysis of your business, locations you serve, and financial products, followed by a phone call between you and our Copywriter to get a complete understanding of your market and unique offerings.
- **Milestone 2:** Create, get approval for, and launch your marketing system within 7-12 days of signing up. We will build and maintain consistent branding and sales messaging throughout all copy and creative.
- **Milestone 3:** After your explicit approval of your new ad campaigns, we will setup your campaigns and promote them to the people shopping for your services right now.
- **Milestone 4:** We will continually monitor your campaigns to make the necessary adjustments to targeting and creative, in the interest of generating new leads and appointments as quickly as possible.
- **Milestone 5:** After we see leads and sales being generated, we will continually be reaching out to assess your return on investment based on our efforts. At that point, we will routinely invite you to scale up your marketing budget to create scalable, predictable returns on your ongoing marketing investment. This is our #1 Goal.

### Measurements of Success

All metrics are tracked and displayed in your password-protected Marketing Portal which uses a 3rd Party platform (Databox) to display key performance indicators that we will be creating, managing and improving.

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#### KPIs (Key Performance Indicators)

1. Significant Increase in new customers directly tracible to The Marketing Agency's efforts using form and call tracking
2. Scalable returns within the first 90 days of service


#### Value

- Higher return on marketing dollars spent from now into the future based on long-term Internet presence enhancement and related implementation of marketing strategies
- Increase predictably of new customers and revenue
- Decrease in time to manage marketing and advertising focus
- Less reliance on referral network
- Significant increase in new customers acquired online

#### Option 1: Facebook Advertising

The goal of the Facebook Advertising System is to advertise your business, to people already looking for your offerings, until they purchase directly from you.

1. We will build **2-6 new Facebook Ads** (1-3 targeting potential customers and 1-3 retargeting exiting leads) each month to ensure a new ad is launched each month, for each grouping of potential local leads, based on the financial products they are in-market for. All creative is subject to e-signed approval from Client before being published.
2. We will use our [Lead Xccelerator System](#) which will give us the names, emails and cell phone numbers of 93% of everyone within each geo-radius, who is searching online for tax minimization, Life Insurance, college planning, converting 401(k)s and 403(b)s, etc. in your local area. We can also provide a list of all website visitors' names, emails and cell phone numbers that have visited the website and landing pages within 2 hours of their arrival. We may then use this information to promote ads and emails to them directly.
  - We will ensure all website visitors continue to see a diverse group of strategic ads until they contact you for services.
  - We will A/B/n Test each Ad and Landing Page element (headlines, images, body copy, calls-to-actions, ad placement, etc.) in order to increase profit-producing elements while eliminating weaker ones.

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## Option 2: All of the elements of Option 1, including Email Marketing


The goal of the Email Marketing System is to 1) sell your services to people, 2) already looking for your services, 3) using email campaigns we create, 4) and email lists generated using our Lead Xccelerator technology that identifies the names, emails and cell phone numbers of everyone looking for your services right now, within the areas you serve.

- We will download lists of every local consumer, within your local area, currently looking for your services while filtering leads based on specific criteria, such as: homeowner, AMEX card, net worth, etc.
- The thrust of our email marketing efforts is simple: Build and send emails that drive people to contact you as soon as possible.
- We will develop and send 2-4 email marketing campaigns each month to drive new clients.
- We will adjust future email marketing efforts based on actionable metrics to steadily increase email open rate, site traffic and make a purchase from email list.

## Terms & Conditions

Option 1 (monthly cycle):	999/month
Option 2 (monthly cycle):	1,499/month
Options 1 & 2 (quarterly):	3,499/quarter

- Payments are automatically processed each billing period on your 1st payment anniversary date.
- You will own everything created on your behalf, and will not be responsible for creating content, images or forms.
- You are responsible for reviewing all work created on your behalf and providing your feedback and/or approval within a reasonable timeframe of 24-72 hours of completion notification.
- Marketing Systems may be paused at any time, and billing and services will not commence until Client gives explicit, signed authorization.

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To your success!

*Maverick Steffen*



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