

The background of the slide features a low-angle, upward-looking perspective of several modern skyscrapers against a bright, cloudy sky. A semi-transparent image of a hand holding a smartphone is overlaid on the right side of the image, with the phone's screen facing the viewer. The overall aesthetic is professional and corporate.

[COMPANY NAME REDACTED]

MARKETING PRESENTATION

TERMS & DEFINITIONS

A GLOSSARY FOR BOTH TECHNICAL AND CONTEXTUAL UNDERSTANDING OF
TERMS USED THROUGHOUT THIS PRESENTATION

- **SQL (“Sales qualified lead”):**

- ▶ The definition of a sales qualified lead will vary across the board of the marketing industry, but in the context of specifically us, an SQL (also known as a “full conversion”) is a client that has made it to the end of the marketing funnel after showing high interest in genuinely converting. If they do not fully pay or show up to a mastermind and/or retreat for [Company Name Redacted], it would not be because our marketing elements need calibration. It would be due to either a flaw in the sales process, or market conditions completely outside of our company’s control (example: perhaps a lead had genuine intentions of going, but their significant other unexpectedly filed for divorce).

- **ML (“Marketing qualified lead”):**

- ▶ The definition of a marketing qualified lead will vary across the board of the marketing industry in the same way the definition of SQL will. However, in a context specifically relevant to us, “ML” refers to an ideal customer persona that has entered our funnel (for example, our mailing list) after expressing interest in attending one of our masterminds/retreats. However, they’ve not reached the end of the funnel yet, or may need more nurturing from marketing for sales to close the deal.

It’s important that we have a glossary of sorts, for the entire [Company Name Redacted] team to be on the same page when we have discussions pertaining to our marketing.

This prevents me from using any esoteric marketing buzzwords that confuse people.

If there are any words you do not understand (or agree with), that we need to add to or clarify further, do not hesitate to let me know.

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- **PQL (“Possible/Possibly qualified lead”):**

- ▶ A “possibly qualified lead” is a person who seems to fit the ideal customer persona within our target market. However, they’re cold to our brand; they may never have heard of us; they may never have seen our advertising, yet. PQLs are cold leads that aren’t in the funnel yet, to be considered MQLs.

- **Ideal customer personas (ICP):**

- ▶ The definition of an “ideal customer persona” or “ICP” is that of our ideal target audience, archetypes delineated by the customer persona files that support this strategy. The archetypes are the following:
 - ▶ Achiever Arvid
 - ▶ Ambitious Adam
 - ▶ Entrepreneur Eric
 - ▶ Explorer Einar
 - ▶ What makes a fit for an ideal customer persona is not esthetic hypotheticals (such as but not limited to where they are from), but their ability to reliably pay for one of our retreats, and the universal archetypal drivers for paying. We may discover unexpected ideal customer personas that we may have to create new documentation for as we execute the marketing strategy, over time.

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- **Funnel conversion rate**

- The “full conversion rate” is the total percentage of ICPs who become MQLs.
- **Example:** A funnel conversion rate of 20% means that after reaching out to a total of 1,000 total PQLs (using whatever hypothetical means), 200 convert into MQLs. → 20% of 1,000 = 200.

- **Full conversion rate (or “full market conversion rate”):**

- A “full conversion rate” is the total percentage of ICPs who become SQLs.
- **Example:** A full conversion rate of 3% means that after reaching out to a total of 1,000 total PQLs (using whatever hypothetical means), 200 convert into MQLs. Out of those 200 MQLs, only 30 of them fully pay and show up. → 3% of 1,000 = 30.

- **Customer/Client Lifetime Value (CLV):**

- The term “CLV” pertains to how much money a single client spends throughout their entire lifetime with a brand, which is often more than one transaction over months or years.
- **Example:** A client fully pays and attends one of our mastermind/retreats for (let’s say...) \$75,000. He loves it so much, he decides to make it a yearly thing. He attends for 7 out of 10 years total before. If he pays \$75,000 each time, his CLV would be \$525,000.
- $7 \times \$75,000 = \$525,000$

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- **Customer/Client Lifetime Value (CLV, *continued*):**

- ▶ In order for there to be a profitable, sustainable marketing model, the amount of money, time, etc. that is invested into marketing ***must*** be less than the output of the company's overall, average CLV with respect for the full market conversion rate. If it costs \$50,000 to secure one client with a CLV of \$525,000...that is considered a profitable marketing model.
- ▶ However, a profitable ***marketing*** model is different than a profitable ***business*** model, because it may take \$50,000 from marketing to gain a client worth a lifetime value of \$525,000, but then cost the business \$425,000 to service this client, leaving only \$50,000 of actual, total profit at the end of everything.

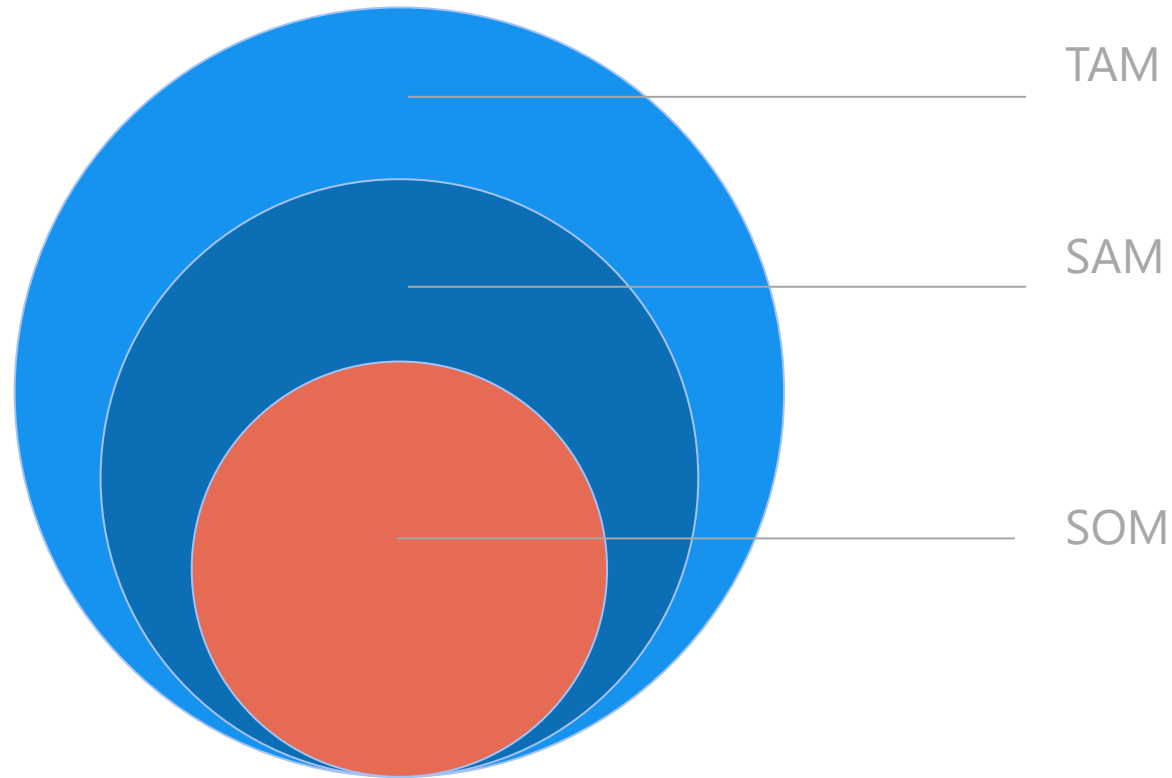
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Total Available Market

The total amount of PQLs in any contextual geographical location, the number based on all ideal customer personas combined.

Serviceable Available Market

The total amount of PQLs for which market conditions for full market conversion will be correct within 3 years.

Serviceable Obtainable Market

The total amount of PQLs for which market conditions are or will be correct for full market conversion within 1 year.

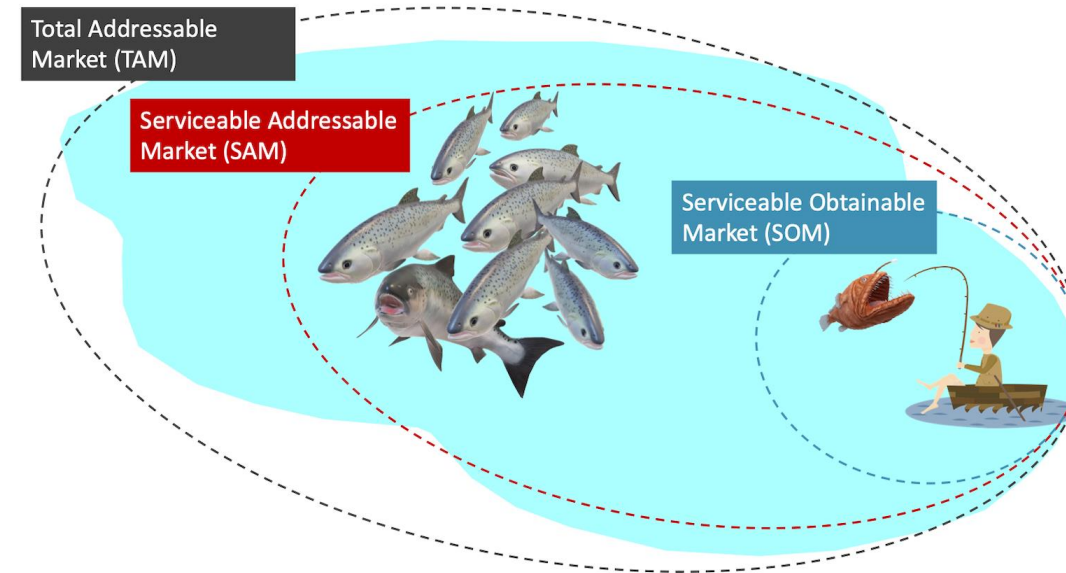
The standard definitions of TAM, SAM, and SOM have been modified specifically for our campaign at [Company Name Redacted].

TERMS & DEFINITIONS

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TERMS USED THROUGHOUT THIS PRESENTATION

We need to measure how many fish can be caught, not how big the pond is

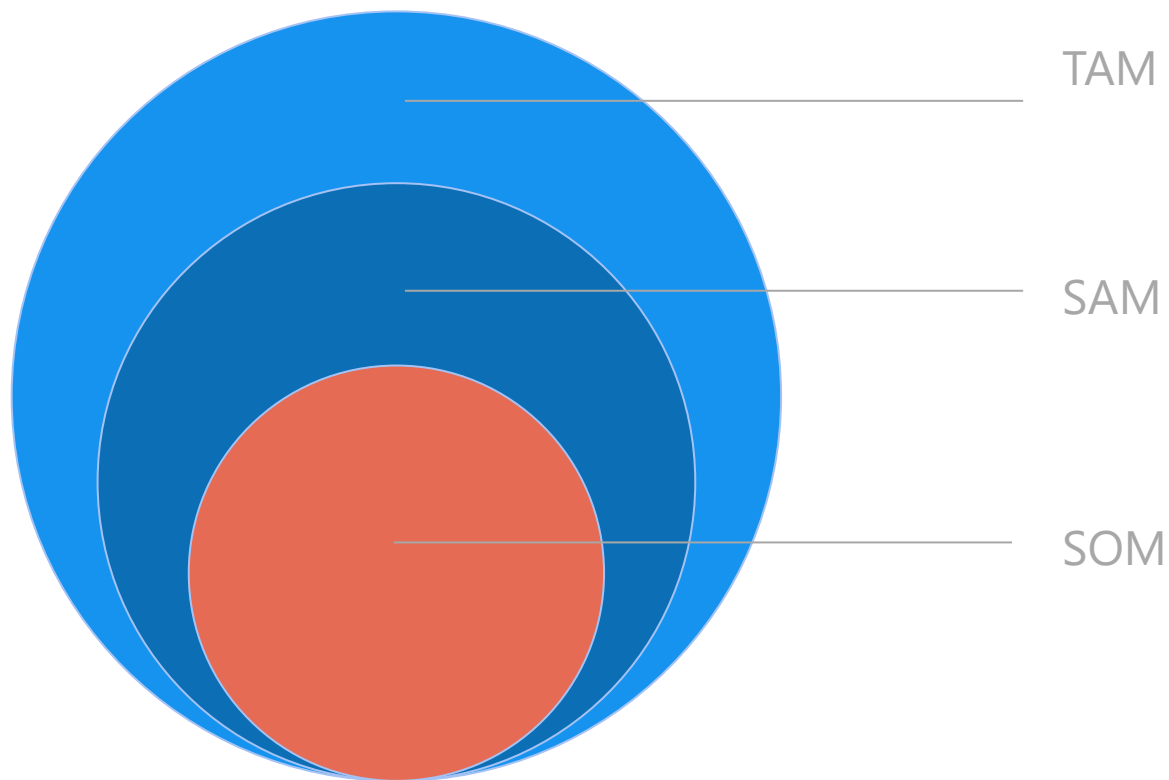
Illustration of TAM, SAM, SOM



The standard definitions of TAM, SAM, and SOM have been modified specifically for our campaign at [Company Name Redacted].

TAM, SAM, SOM

LIMITED TO THE TOP SIX COUNTRIES REPORTED TO CONVERT FOR
[Company Name Redacted]



580,000 (est.)

CEOs, Investors, Founders, and Co-Founders with at least 3 years experience in their roles, throughout the USA, UK, Spain, Sweden, Argentina, and Mexico, according to LinkedIn.

116,000 (est.)

Determined by the Pareto principle, separated by the range of beliefs/values that are likely compatible with [Company Name Redacted] that not every PQL may have. Based on the assumption that 50% of the TAM has incompatible values.

23,200 (est.)

The total amount of PQLs for which market conditions are or will be correct for full market conversion within 1 year. Determined by the Pareto principle extracted from the SAM.

To be frank: Excluding the calculation of the TAM, these assumptions are completely open to calibration with real-time market data as we experience it, due to the fact that the tools are not available to assess the beliefs of the entire market in the initial time frame of the strategy's development.

The Pareto principle implies the assumption that 80% of our revenue can and would be generated from 20% of the market.

AXIOMATIC ASSUMPTIONS

A QUICK REFERENCE FOR THE ASSUMPTIONS THAT THE NUMBERS IN THIS STRATEGY IS BASED ON, WHICH MAY CHANGE

- **Funnel conversion rate: 20%**
- **Full market conversion rate: 1%**
 - ▶ Out of an estimated 23,200 PQLs in the SOM, we should expect to fully convert at least 232 of them the first year.
 - ▶ At a funnel conversion rate of 20%, this means that we should get a minimum of 4,640 MQLs within the first year.
 - ▶ The total amount of people we can convert in any given time frame can jump up by exponentials given consistent, scaled marketing (meaning that 232 is a *start*, a minimum, depending on how company infrastructure evolves).
 - ▶ At a spend range between \$75,000 to \$120,000 annually, this means a projected forecast of \$17.4 million to \$27.8 million dollars in value within the funnel for [Company Name Redacted] within 1 to 3 years time if we hit our goals. NOTE: I can generate that value in the funnel, but someone specializing in sales must “close” them.
 - ▶ The services for many of our clients will be paid for out of company revenue as part of a tax write-off, rather than out of the personal salary of the CEO, thereby making the salaries of the customer personas strong *indicators* of market compatibility, rather than *absolute* determiners. (Ref: Comingling funds, why top CEOs actually keep their salaries low, Elon Musk \$1/Jeff Bezos \$80k)

Assumptions almost always change throughout the actual execution of the strategy throughout the year.

This process is natural.

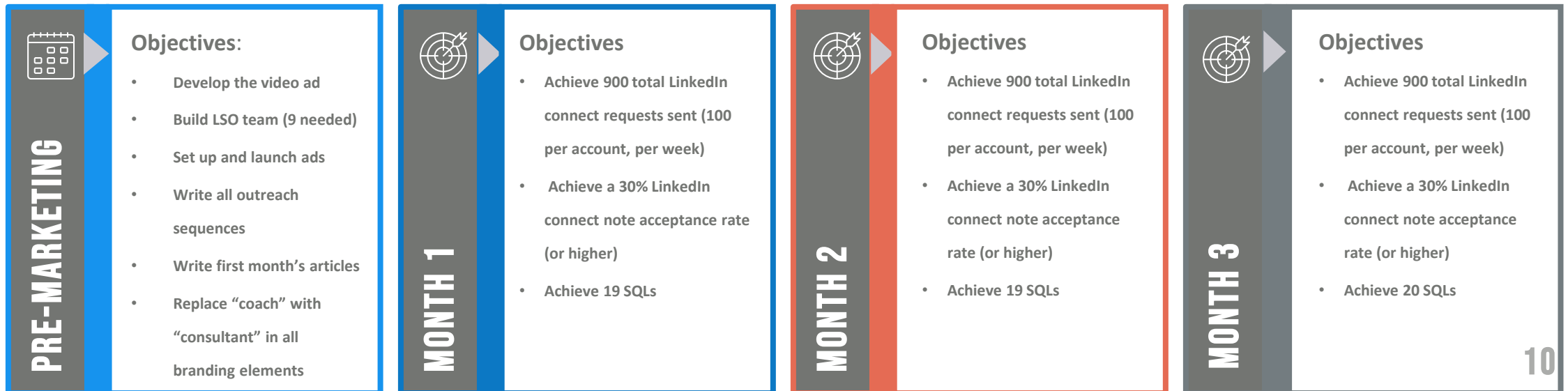
4-PHASE PROCESS FOR THE FIRST QUARTER

GOALS:

- ACHIEVE 1,160 MQLS IN OUR FUNNEL IN THE FIRST THREE MONTHS OF LAUNCH
- EXTRACT 58 SQLs FROM THE MQLS IN THE FIRST SIX MONTHS OF LAUNCH
- ACHIEVE 4 HIGH DOMAIN MEDIA OUTLET ARTICLES PUBLISHED ABOUT US/SCOTT IN THE FIRST 3 MONTHS OF LAUNCH

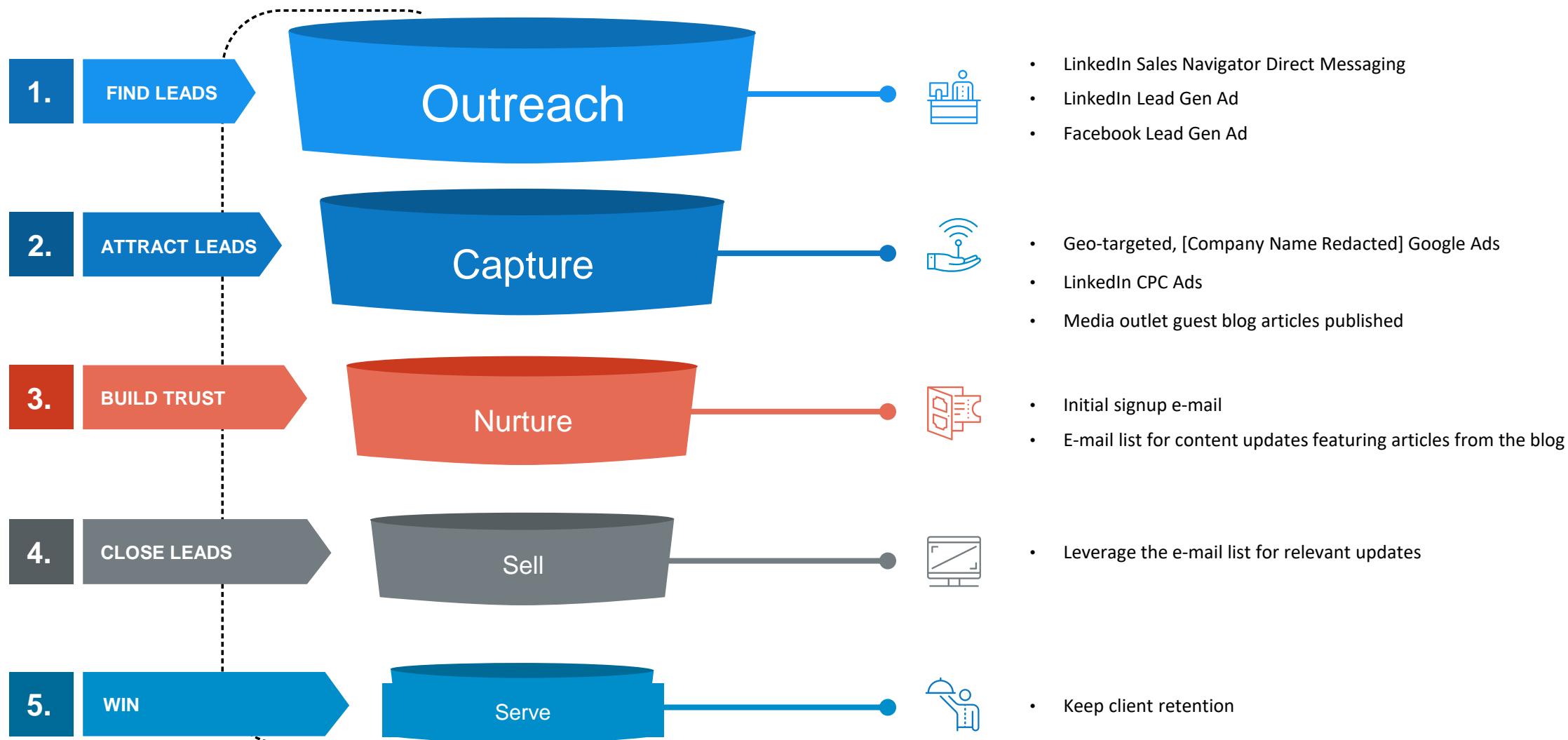
The number of SQLs are determined by the 232 total forecast divided by 4 to represent the 4 business quarters throughout the year. If we achieve the goal of 58 SQLs (or higher) within the first quarter of our marketing campaign, we would achieve the minimum of 232 throughout the year. If market conditions aren't favorable, then we can use these goal metrics as what to strive for as ideals until market conditions shift in our favor.

STEPS TO ACHIEVE THE GOALS



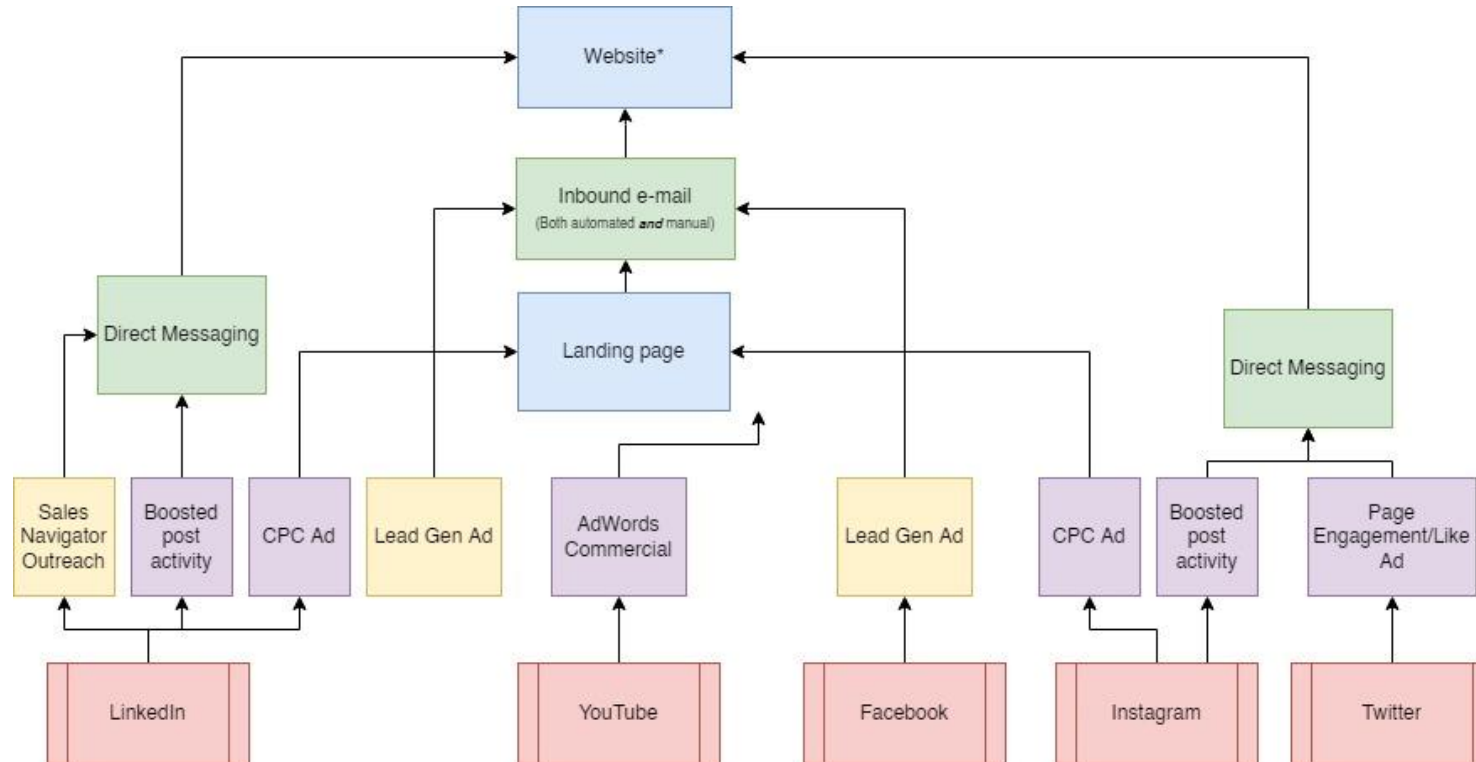
THE OVERALL MARKETING FUNNEL

THE TOP RECOMMENDED APPARATUSES OF
THE MARKETING STRATEGY



THE OVERALL MARKETING FUNNEL

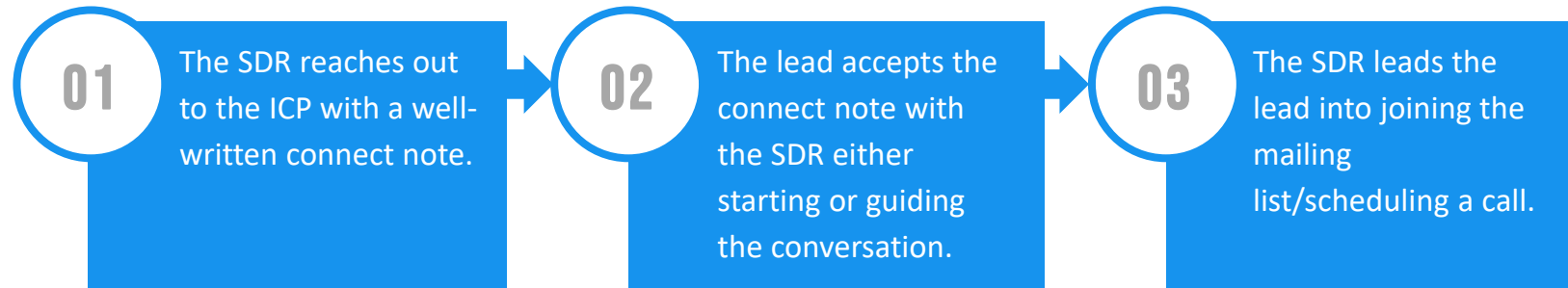
THE OVERALL RECOMMENDED APPARATUSES OF
THE MARKETING STRATEGY



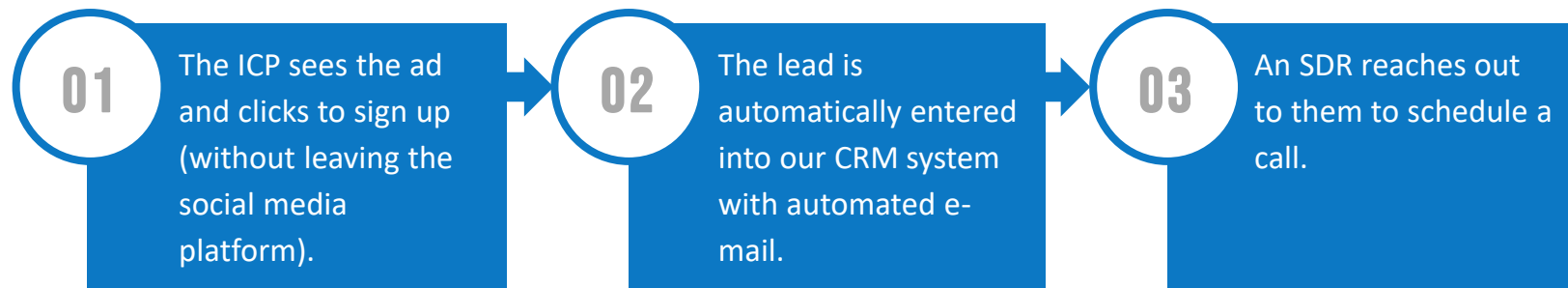
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THE LINKEDIN SALES NAVIGATOR OUTREACH PROCESS



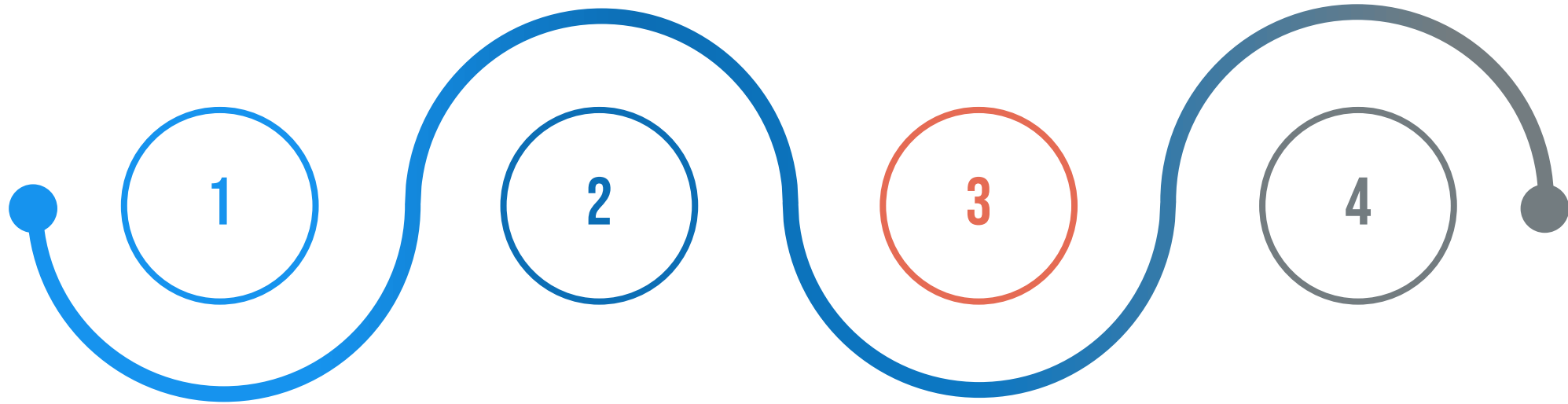
THE LINKEDIN/FACEBOOK LEAD GEN AD PROCESS



Lead Gen ads are different than standard PPM or PPC ads that require a landing page.

RECOMMENDED BLOG CONTENT DEVELOPMENT PROCESS

THE WAY CONTENT SHOULD BE DEVELOPED FOR THE BRAND



PLANNING

Mike plans the initial content, bi-weekly.

OUTLINING

Mike outlines the content to guide [Company Name Redacted]'s writers.

1ST DRAFT

One of the brand's writers writes the first version of the content Mike outlined.

POLISHING

Mike performs the final review of the content.

Content will be SEO-optimized to increase its chances of ranking organically.

IDEAS FOR BLOG ARTICLE HEADLINES

THE WAY SEO MARKETING SHOULD BE EXECUTED FOR THE BRAND

- **X Successful Business Growth Strategies from Leading Brands**
- **X Factors Inhibiting Your Business Growth**
- **Top X Mindsets and Practices of Successful CEOs**

There is also the notion of “newsjacking” for faster SEO growth and virility: Rewriting the headlines that we know are relevant to CEOs as they appear on Google, and then immediately covering the same topic in a charismatic way the same way YouTube react videos work

Blog articles should be between 600 to 800 words, *typically*.

Though, how to optimize each for SEO specifically will depend on the article. There is no one-size-fits-all standard way of doing so that can game the search engines. It’s about looking up the headline you want to write about in Google, seeing what’s already been published with similar headlines and/or keywords, and then outperforming whatever those are, on a case-by-case scenario.

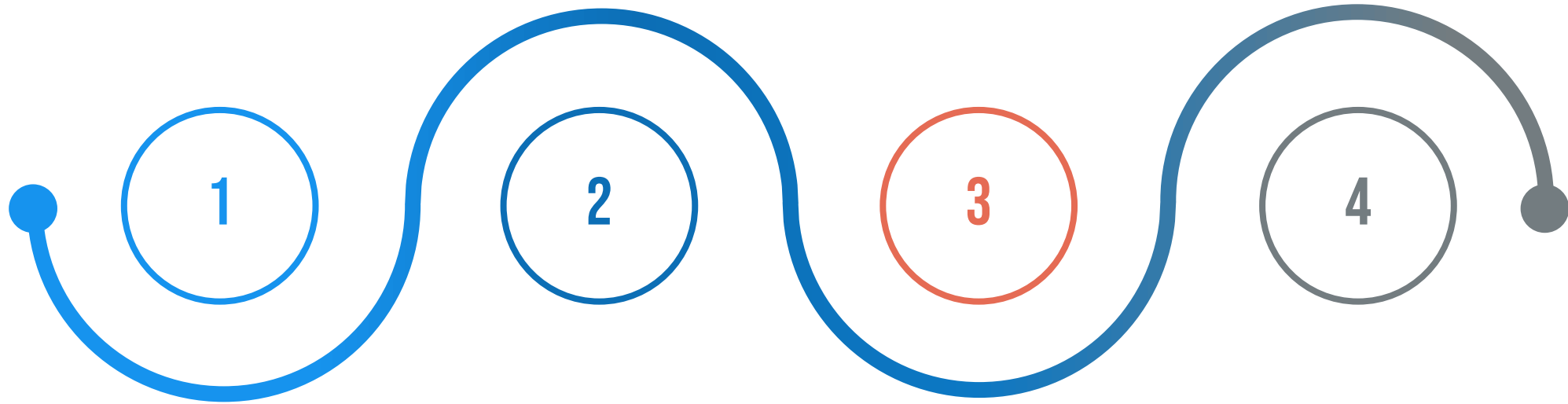
There are many technical tools to help with this that I have.

I recommend a total of 12 articles per month; however, they don’t all have to be ready ahead of time.

So long as we stay one-week ahead in our publishing schedule, we can still meet our goals.

RECOMMENDED SOCIAL MEDIA CONTENT DEVELOPMENT PROCESS

THE WAY CONTENT SHOULD BE DEVELOPED FOR THE BRAND



PLANNING

Mike plans the initial content, bi-weekly.

OUTLINING

Mike extracts good quotes from the blog content.

DESIGNING

Mike turns (or has someone turn) the quotes into a graphically beautiful pictures.

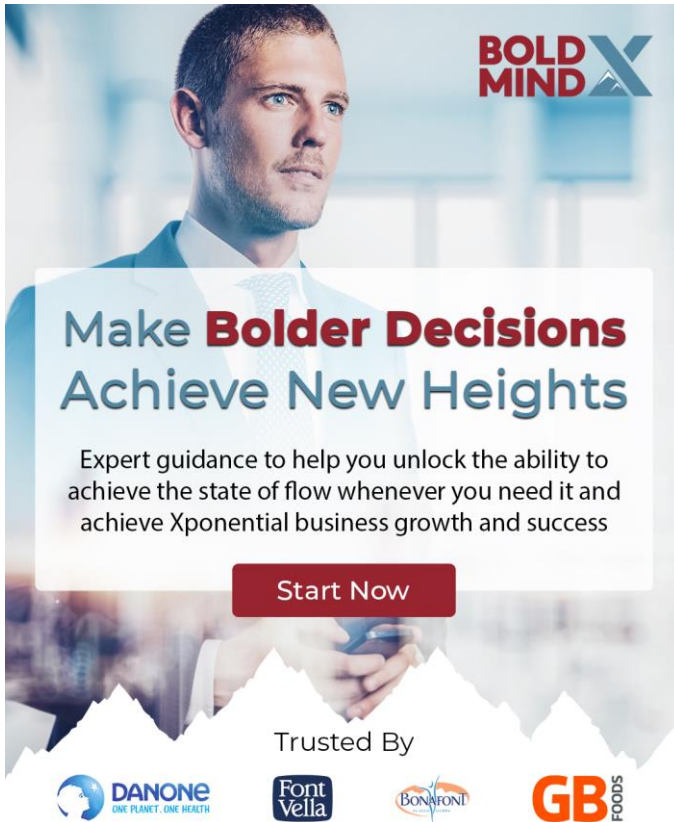
SCHEDULING

Mike schedules and manages the social media publishing and engagement.

This can all be executed without interaction from Scott.

BRAND ASSETS FOR INFLUENCERS

EXAMPLE GRAPHICS INFLUENCERS CAN USE IN THEIR CONTENT




BOLD MIND X


Make **Bolder** Decisions
Achieve New Heights


Expert guidance to help you unlock the ability to achieve the state of flow whenever you need it and achieve Xponential business growth and success


[Start Now](#)

Trusted By

 **DANONE**
ONE PLANET. ONE HEALTH

 **Font Vella**

 **BONAFONT**

 **GB** FOODS



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 **GB** FOODS

Either me and my personal assistant can make these, or someone on the team.

RECOMMENDED SEO MARKETING PROCESS

THE WAY CONTENT SHOULD BE DEVELOPED FOR THE BRAND



GET THE TOOLS

[Company Name Redacted] buys a subscription to the recommended SEO outreach & discovery tools.

ARM THE TEAM

Mike writes the initial outreach sequences that the company's SDR team can use at scale.

REACH LEADS

The company's team follows Mike's script guidelines for how to reach out to backlink opportunities at scale.

SECURE LINKS

As stats come back on conversion rates, Mike will optimize the writing of the campaign to increase how many deals we can close.

The SEO outreach campaign would be exactly like a cold e-mail campaign.

Only, instead of trying to close sales, we'd be closing the blog articles to post guest blogs or backlinks for us.

Many will decline us. That's a natural part of the process. The price range to expect for each article or link will range between \$50 to \$250 dollars on average.

EXAMPLE SEO OUTREACH MESSAGE

THE WAY SEO MARKETING SHOULD BE EXECUTED FOR THE BRAND

Initial Outreach Message

Subject: Connecting

Hello, [Name, if known].

I have noticed lots of useful content on [\[insert topic here\]](#) on your website, and I would like to inquire about a possibility to submit a guest post for your blog.

The suggested topic of the article is [\[insert article headline here\]](#).

I believe that content like this could be very useful for the readers of [\[insert name of the website you are e-mailing here\]](#). The reason why is because [\[insert 1 strongest reason here\]](#).

Do you think it would be a good fit for your blog?

Looking forward to hearing from you.

Best regards,

[Signature]

PS :: Here are some examples that have been published about us in the past...

1. *Link 1*

2. *Link 2*

There should be follow-up messages for the blogs that don't get back to us.

RECOMMENDED PAID AD OPTIMIZATION PROCESS

THE WAY CONTENT SHOULD BE DEVELOPED FOR THE BRAND



DRAFT THE ADS

Mike drafts the ads, writes the scripting, etc. that [Company Name Redacted] will approve (with any requested changes it wants).

LAUNCH THE ADS

Mike will launch the ads on each respective social media platform.

GET RESULTS

Mike will optimize the ads over time.

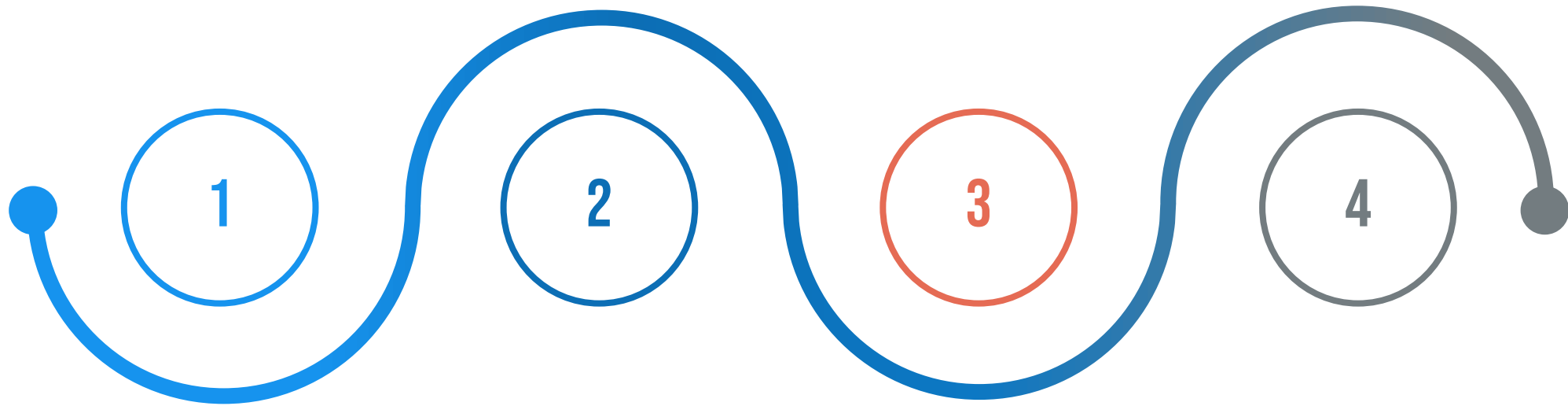
OPTIMIZE

Mike will cut the ads that underperform and construct entirely new ads as high-performing ones achieve market exhaustion.

Each new ad campaign takes the most time to set up, initially; however, once they are set up, optimizing them requires fewer and fewer hours per week.

RECOMMENDED INBOUND E-MAIL MARKETING PROCESS

THE WAY CONTENT SHOULD BE DEVELOPED FOR THE BRAND



GET THE TOOLS

The company will pay for a subscription to a recommended inbound e-mail marketing platform if he hasn't already.

PLAN CAMPAIGNS

Mike will plan the e-mail campaigns to match the publishing schedule of both the brand and influencers.

GET RESULTS

Mike will study the open and click rates to see what types of subject lines and content is working and which are not.

OPTIMIZE

Mike will write new subject lines and change content planning based on what the data tells him to keep people addicting and using the app.

Each new e-mail campaign takes the most time to set up, initially; however, once they are set up, optimizing them requires fewer and fewer hours per week.

EXAMPLE LINKEDIN CONNECT NOTE

THE WAY LINKEDIN MARKETING SHOULD BE EXECUTED FOR THE BRAND

Initial Outreach Message/Connect Note:

Hello, {name}.

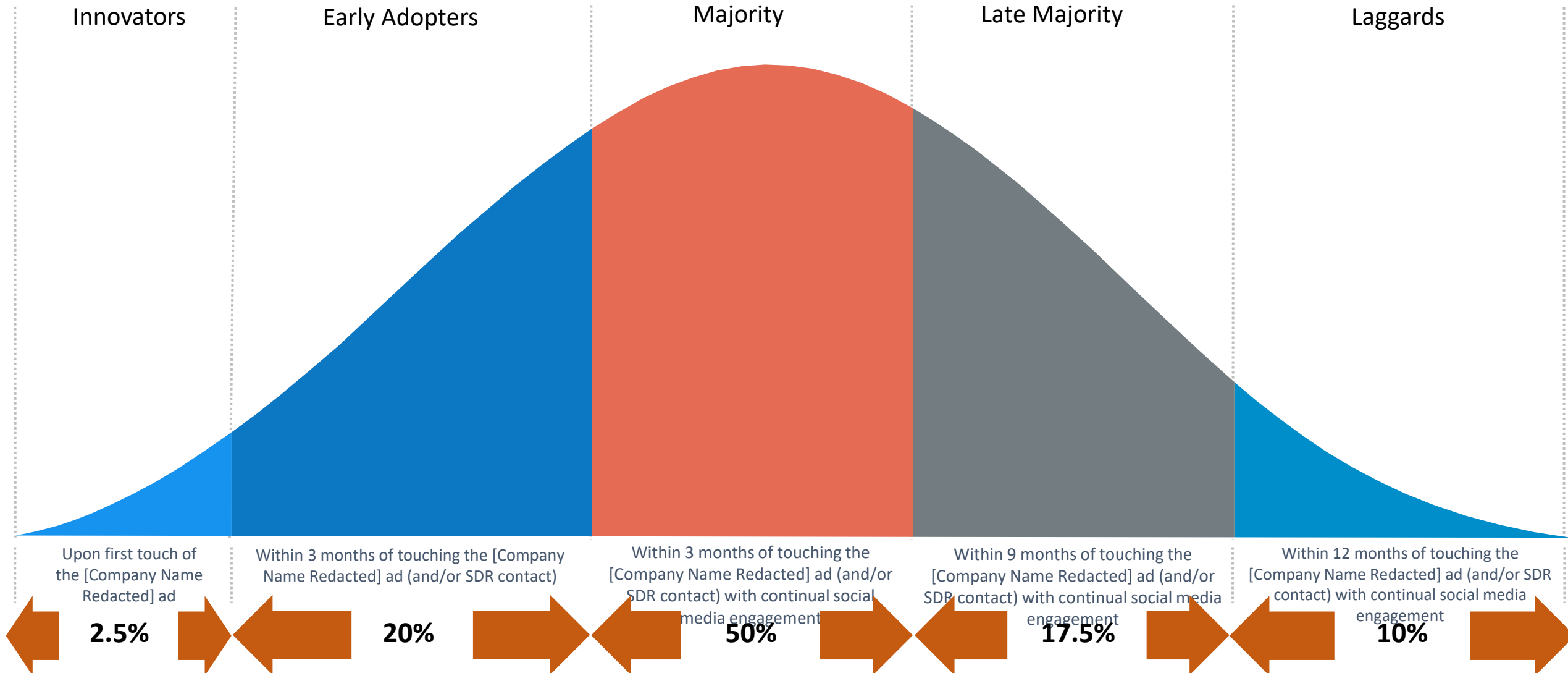
I'm a part of a team that provides support to elite CEOs in the fields of corporate strategy, M&A integration, and more. We've scouted you as someone who could save millions of dollars per year with us. I'd love to connect.

There should be messages for people who accept connect requests along with follow-ups for the that don't get back to us after that.

The value in doing this is preparing what content our target audience sees ahead of time to sculpt the perception of [Company Name Redacted] when they research us after they see one of our connect notes or ads.

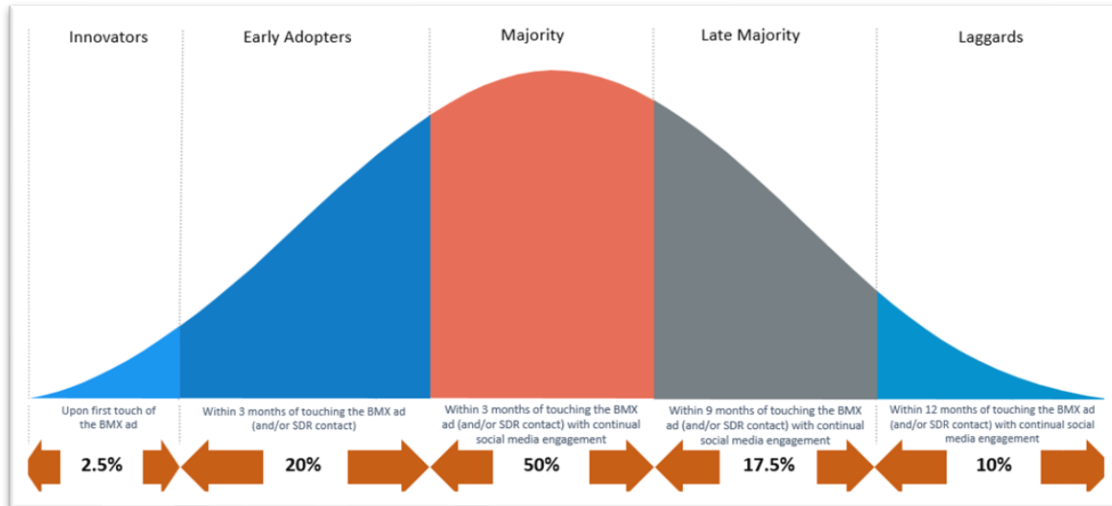
THE CONVERSION CYCLE FORECAST

THE USER IS THE PRODUCT, BUT HERE ARE THE EXPECTED CONVERSION RATES IN EACH TARGET POPULATION VIA ADVERTISING BEFORE WE'D NEED TO CREATE A NEW AD CAMPAIGN



QUARTERLY CONVERSION EXPECTATIONS

ACCORDING TO THE GAUSSIAN SCALE



- A PQL becomes an MQL at the connect acceptance or ad form submission.
- An MQL becomes an SQL when they either schedule a call or show genuine, high interest in scheduling a call within a 3-month period.

The following numbers are extracted from the 58 SQL goal for the quarter.

- ▶ **Innovators:**
 - 1-2 SQLs should convert right away (upon first contact with the brand).
- ▶ **Early adopters:**
 - 11-12 SQLs should convert within 3 months of first brand contact.
- ▶ **Majority:**
 - 29 SQLs will have genuine intentions of converting before 6 months is up, but will trail over it.
- ▶ **Late Majority:**
 - 10-11 SQLs will kick tires until a catalyst finally kicks them into gear at the 6-9 month mark..
- ▶ **Laggards:**
 - 5-6 SQLs will kick tires until a catalyst finally kicks them into gear at the 9-12 month mark..

These are how many we should actually expect ready to pay us beyond the SQL sales call.

MARKET CONDITIONS & CONTINGENCIES

WHAT CAN FORESEEABLY GO WRONG IF WE'RE FAILING TO REACH OUR GOALS AND WHAT TO DO ABOUT IT

1. PAID ADVERTISING

- People are unresponsive to the ads

Analyze why: Are they responding angrily? Are they saying nothing? Are they not clicking? Are they clicking but not converting? All of these have different psycho-analytical answers that would need tweaking accordingly.

If they are responding angrily, observe the qualitative data and launch a new set of ads that respect the anger points.

If they are not responding at all (including not clicking), then check the targeting of the ad, or go for a more emotionally spiking approach with a new ad set.

Are they clicking but not converting? Check the targeting: There is a mismatch with the offer and its audience. Refer to Scott about possible new promotional incentives to hook them if the targeting is already correct.

2. LINKEDIN SALES NAVIGATOR OUTREACH

- The LSO team isn't meeting their goals

Analyze why: Which metric are they not achieving? Is their connect acceptance rate below 30%? Are they receiving connect acceptances, yet the conversations lead to rejections?

If their connect acceptance rates are below 30%, then there is something wrong with the presentation of their profile and/or their connect note. Calibrate them.

If their connect acceptance rate is above 30%, yet their conversations in the direct messages are falling short, then check each conversation that failed for the qualitative information why: What was being said, in what way, when, and in what context? Calibrate the messaging sequence.

3. E-MAIL MARKETING

- The e-mails are not leading people into scheduling calls.

Analyze why: Are they not opening the e-mails? Are they opening the e-mails but not clicking on anything? Are they opening the e-mails, clicking on various things, but still not scheduling the call?

If they are not opening the e-mails at all, that begs the question how they were interested enough to get on the e-mail list in the first place. If their initial LinkedIn conversation was enthusiastic or their interaction with the ad seemed good, then it's likely that they are interested, but the subject lines are boring. Calibrate them.

If they are opening the e-mails but not clicking on anything, there is not a strong enough incentive in the e-mail for them to do so. Calibrate what is written in the e-mails.

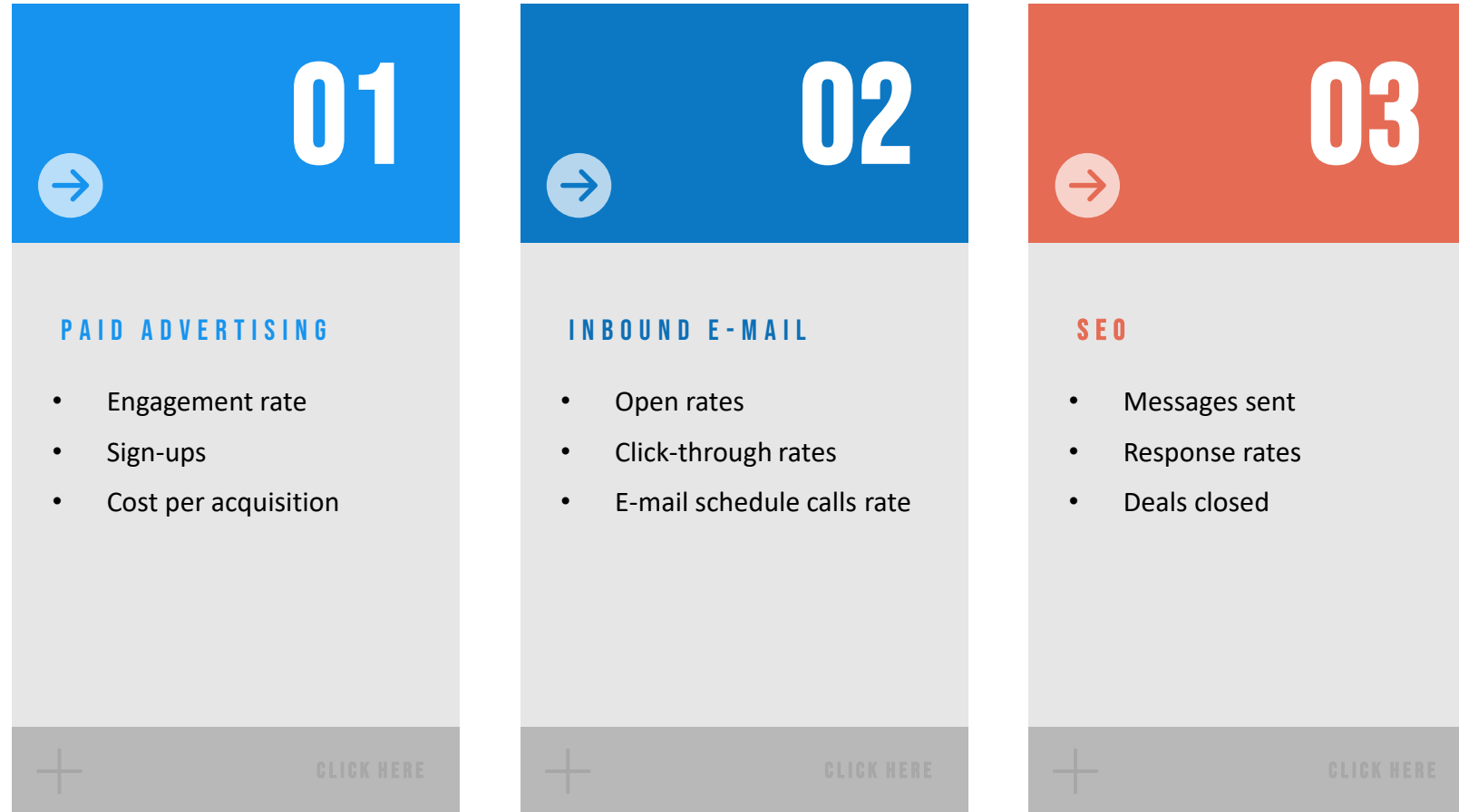
If they are opening the e-mails and clicking, but not scheduling, then the timing is just not likely right for them. Continue with the content as is and keep at the top of their mind with regular updates until the timing is right for them.

I've run into each of these problems before in varying ways and contexts for different companies.

They all have solutions.

KEY PERFORMANCE INDICATORS (KPIs)

KEY METRICS TO PAY ATTENTION TO FOR DETERMINING THE PACE OF OUR SUCCESS, AS WELL AS TROUBLESHOOTING PROBLEMS IN OUR CAMPAIGN



These metrics are what I'm going to report the progress of the campaign every week or bi-weekly in an organized presentation like this one.

If any specific KPI isn't being met throughout the campaign, I'll provide custom recommendations for you/the team to approve (or not) on what I should do to differently along the way, to roll with the punches of the market.

WHAT I NEED TO BE SUCCESSFUL

REQUIREMENTS FOR SUCCESSFUL MARKETING STRATEGY EXECUTION

- ***9 people willing to be LinkedIn Sales Navigator outreach people***
 - **Why:** LinkedIn limits how many people you can send connects to per week, to 100. This means, to achieve our MQL goals (which trickles directly into our SQL goals, which may seem highly ambitious but are totally possible), we need 9 + myself sending out 100 connects per week with a 30% connect acceptance rate (or higher).
 - **How:** If there are people on the team who are willing to donate their accounts to the cause, I can manage it for them without fear of a TOS violation via VPN. I can also tap into my network of freelancers I've worked with throughout the years. There are also lead generation services that we can outsource to. Open discussion. If I manage Scott's account, then between his account and my own, that's 200 per week right there.
- ***A flexible ad budget***
 - **Why:** Paid advertising will not only serve the purpose of converting cold leads into MQLs; they will also serve the purpose of raising brand awareness ahead of the pace that the LinkedIn Sales Navigator outreach can occur. If we have ads that target the same exact audience that we are manually reaching out to, by the time we reach out to most of our prospects, they will have seen us 3-7 times via ads and will recognize our name, therein making them far more likely to accept our connect requests because they'd have already become relatively familiar with us. However, to do so is relatively expensive on LinkedIn, in contrast with Facebook.

Brand strategy may need to be reevaluated if the above cannot be met.

WHAT I NEED TO BE SUCCESSFUL

REQUIREMENTS FOR SUCCESSFUL MARKETING STRATEGY EXECUTION

- ***Dedicated sales people scheduling and taking calls***

- **Why:** I can lead and take responsibility for generating the leads that puts the dollars in the funnel; however, it's best if someone else closes them. Ideally, Scott himself (the only thing I would need Scott to be hands-on about: talking to the SQLs who see his face on the website).

- I can catch the fish and hook them, but someone else needs to clean them and fry them.

- Marketing and sales overlap and rely on each other; however, these are two distinctly different fields.

Brand strategy may need to be reevaluated if the above cannot be met.



QUESTIONS?

Brand strategy may need to be reevaluated if the above conditions exist.