



MARKETING DIRECTIVE - CONFIDENTIAL

Revised October 30, 2023

SELLING A CMA – Instant Hat

Note: This is an “Instant Hat” and used to get someone trained enough to start presenting.

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

Notes: 1) *We have two sister companies under common ownership, Buzzazz and Local Search Force. We’ve recently combined efforts and rebranded creating Expansion Support Services (ESS). Some videos and documents may still list our founding companies.* 2) *Highrise is the name of our CRM.* 3) *If you get lost or confused, STOP AND CALL FOR HELP.*

- ____ **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. READ:** Read and understand the “Appointment Setting Script” and “Questions and Answers”.
- ____ **4. DRILL:** Read aloud 3 times, loud and proud, each of the Questions and their Answers.
- ____ **5. WATCH:** Watch the “Online Strategic Planning” Video at: <https://www.youtube.com/watch?v=YUXj6joc0Us>
- ____ **6. READ:** In the ESS website’s navigation bar, click on “Start” and study this page.
- ____ **7. PRACTICAL:** At the bottom of the Start page, complete the form using made up business data. In Highrise, there will be downloadable CMA Order form. Review it so you can smoothly fill it out with a client. Print a few copies.
- ____ **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=TLPQMTlxMTlwMjPQAzcgl0aVJw&index=3>
- ____ **9. READ:** Read the CMA Sales Pitch.
- ____ **10. WATCH:** Watch the “Patter Drill” Video at: <https://www.youtube.com/watch?v=kEx3fCVUy44>
- ____ **11. DRILLS – Do each of the below by yourself but get a checkout by the Supervisor to pass.**
 - a. ____ Patter drill each numbered sentence one at a time until you can recite verbatim the line without looking.
 - b. ____ Patter drill Part A until you can recite all sentences in Part A from start to finish verbatim without looking.
 - c. ____ Patter drill Part B until you can recite all sentences in Part B from start to finish verbatim without looking.
 - d. ____ Patter drill Part C until you can recite all sentences in Part C from start to finish verbatim without looking.
 - e. ____ Patter drill Part D until you can recite all sentences in Part D from start to finish verbatim without looking.
 - f. ____ Patter drill Part E until you can recite all sentences in Part E from start to finish verbatim without looking.
 - g. ____ Patter drill Part F until you can recite all sentences in Part E from start to finish verbatim without looking.
- ____ **12. PRACTICAL:** Recite (you can use written document), the CMA Sales Pitch LOUD and NATURALLY until you can communicate the pitch easily and without stumbling or being tongue-tied. Get a checkout by your Supervisor to pass.



___ 13. **READ:** Read and understand the Directive, “The Flow - Spotlight Story Presentations”.

___ 14. **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.

___ 15. **READ:** Read the Directive, “Spotlight Edits”

___ 16. **PRACTICAL:** Enter a practice business into the County Advisory Board website at <https://countyadvisoryboard.com/spotlight-input/>.

Then at 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.

Make a few edits to the story you just created, save/publish and view the updated story.

___ 17. **READ:** Read and understand the below Document Pre-Game.

- ___ 18. **PRACTICAL:** Pick a pest control, tree services or carpet cleaning company and do a Pre-Game.
- A. Create their County Advisory Board story and review it.
 - B. Review their website looking for outpoints.
 - C. Do Google searches locating where the website (not GMB profile) does not show up where it should.
 - D. Create a brief Ranking Report.

Note: With real prospects, you’ll add this data into their Highrise profile for easy access.

___ 19. **READ:** Read the Directive, “New Customer Acquisition Process”

___ 20. **DRILL:** Do the Sequence Drill with a Coach then get a Supervisor’s Pass

___ 21. **FINAL PRACTICAL:** Role play with another the entire CMA sales process using screen sharing, CAB story, pre-game, etc. as much as needed and until you feel comfortable getting on the phone with a prospect. Get a Pass by the Supervisor.

YOU ARE NOW READY TO MEET WITH PROSPECTS, PRESENT, & CLOSE!

___ 22. **CONDITIONAL:** **After** you close a CMA, do each action contained in the Directive “Completing a Sale”.

___ 23. **COMPLETION:** Be able to close 1 or more CMAs per day as evident by closing 3 businesses on CMAs within a 3 day period without gaming (closing buddies, sandbagging orders to all close in 3 days, 1 client w/3 companies, etc.)

I attest that I have been trained to my satisfaction and am confident I can close a CMA per day.

X _____ **Print Name:** _____ **Date:** _____



Appointment Setting Script

OPENING

Good(morning/afternoon). My name is _____ and I am calling on behalf of the County Advisory Board website.

We're reaching out because we are doing a FREE spotlight article on you and your business. I just need to speak with one of the owners for a brief phone interview.

Note: Repeat the opening to the owner if the person you were speaking with is not the owner.

INTERVIEW – Start asking questions and entering the data entry screen

- How long have you been open, or what year did you open the business?
- I Have the phone number as _____, and are you still at (address)?
- What is a good email address to send a link of your story to?
- What is the correct spelling of your first and last name?
- Are there any other owners that we would include?
- How many employees do you have?
- When it comes to the community do you participate in any charities?

SETTING THE APPOINTMENT - Immediately Start the Online Form

Now, you do get a chance to approve the story before it gets published. We do what they call a live edit, one of the consultants will come by to edit the story so we can get it published.

What is good time _____ (*in the next hour or so, later today, tomorrow*) when you can be in front of a computer to do a screen share for 15-20 minutes so you can review and we can edit the story?

The consultant will go over the story with you and can make any changes. Once you give them your approval, the consultant will publish your spotlight article and show you how the general public will find the article through google searches, and how you can access the story so you can add it to your social media or email its link.

Once done with the story, the consultant is going to tell you about Expansion Support Services, the company that owns and manages the County Advisory Board website. They'll brief you on our services and how we help companies in your industry get more customers.

Before I let you go, do you have any questions for me?

Great. Our consultant will meet with you _____.



QUESTIONS AND ANSWERS....

1. What is the County Advisory Board? It's a website that was created to promote positive stories about businesses and their owners.

We reach out to businesses and offer these FREE articles showcasing them and what they do in exchange for getting to introduce our company and services to local businesses.

We then post the articles to the County Advisory Board website. So basically, it's free advertising for you.

2. What's the catch? or Are you going to sell me something? After the Spotlight Story is done, we are going to introduce our company, and the services we provide. If you have a need for our services now or in the future, we hope that you consider using our services to assist you in your expansion.

3. What company are you with? I work for Expansion Support Services. We own and manage the County Advisory Board website.

4. How much does the story cost? We write, edit, publish the Spotlight Story and keep the article posted on the County Advisory Board for a year for free. We do want you to give us 15 minutes of your time to introduce our company and services.

If you want to keep the free article posted after a year, we'll keep it online for \$20 per year which you can decide in a year.

5. (For a Phone Appointments) Do I need to be in front of a computer and do a screen sharing for the edit? Yes. The Consultant will do a screen share with you so that you can see the article and edits made in real time. This saves your time and ours as the appointment can then be done in one phone call.



CMA SALES PRESENTATION

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?

What does, on average, a new customer spends with you? So _____ (*how many more customers in a week*) X \$_____ (*average spend*) indicates you are missing out on about \$_____ per week.

When researching your company, I noticed that your website doesn't show up on page 1 of Google for _____ (city) _____ (keyword). I'm talking about your website showing up in a Google search, not your Google listing in Google Maps.

Your website should show up in a Google search for _____ (city) _____ (keyword). Did you know your it doesn't? (*you can show client*)

There is something wrong with your website.

We have an introductory product that I think is perfect for you. It's called the competitive market analysis.

It's only \$95 and comes with a 100% money back guarantee, no questions asked. Can I tell you about it? (*continue if a yes, or end of a no*)

Great. A little background on our company... We've analyzed the computer coding on over 20,000 websites and are the #1 company in the world for figuring out why websites are not showing up in searches.

For example, have you ever heard of the restaurant Bone Fish Grill or Outback Steakhouse?

They spent \$450,000 on their Bonefish Grill website and did not show up for the term SEAFOOD in any of the 220 cities where their restaurants are, their parent company contracted us to resolve their issues.

We've helped some of the largest and some of the smallest companies.

When a business isn't showing up in Google, they are missing out on customers and losing money. We have a team of very smart tech guys that will go through the computer code in your website and figure out why you are not showing up. As part of the process, they will compare your computer code with the companies that are dominating Google in your area. They will write up the details of what they discover and provide very specific recommendations.

I will then meet with you using a screen share to go over problems the tech guys find, how to fix problems and any other recommendations they have to help you dominate the internet. You'll know exactly what needs to be done which will clear up any confusions.



You can either fix the issues yourself or we'll give you a quote if you want us to fix the issues. We'll also create and provide you with an internet marketing strategy so you can dominate online.

As mentioned, this Competitive Marketing Analysis cost is a one-time \$95. After the consultation, I'll give you your money back if you don't think this service was worth \$95. Now, to get this rolling, I just need the credit card you want to use for the \$95? (*Cemetery Silence*)

AFTER YOU GET THE CREDIT CARD #, COMPLETE THE ONLINE ORDER FORM & SCHEDULE THE CONSULTATION



CMA SALES PRESENTATION - PATTERN DRILL

PATTERN – Part A

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 spend) indicates you are missing out on about \$_____ per week.

PATTERN – Part B

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.

PATTERN – Part C

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)

PATTERN – Part D

1. Great. A little background on our company... We've analyzed the computer coding on over 20,000 websites and are the #1 company in the world for figuring out why websites are not showing up in searches.
2. For example, have you ever heard of the restaurant Bone Fish Grill or Outback Steakhouse?
3. They spent \$450,000 on their Bonefish Grill website and when they did not show up for the term SEAFOOD in any of the 220 cities where their restaurants are, their parent company contracted us to resolve their issues.
4. We've helped some of the largest and some of the smallest companies.



PATTER – Part E

1. When a business isn't showing up in Google, they are missing out on customers and losing money.
2. We have a team of very smart tech guys that will go through the computer code in your website and figure out why you are not showing up.
3. As part of the process, they will compare your computer code with the companies that are dominating Google in your area.
4. They will write up the details of what they discover and provide very specific recommendations.
5. I will then meet with you using a screen share to go over problems the tech guys find, how to fix problems and any other recommendations they have to help you dominate the internet.
6. You'll know exactly what needs to be done which will clear up any confusions.

PATTER – Part F

7. You can either fix the issues yourself or we'll give you a quote if you want us to fix the issues.
8. We'll also create and provide you with an internet marketing strategy so you can dominate online.
9. As mentioned, this Competitive Marketing Analysis cost is a one-time \$95. After the consultation, I'll give you your money back if you don't think this service was worth \$95.

Now, to get this rolling, I just need the credit card you want to use for the \$95? *(Cemetery Silence)*

AFTER YOU GET THE CREDIT CARD #, COMPLETE THE ONLINE ORDER FORM & SCHEDULE THE CONSULTATION



The Flow - Spotlight Story Presentations

PRESENTATION SEQUENCE

1. Pre-Game Prep: A) Print a copy of the Story, B) Check out the client's webs presence, C) Find Geo-Keywords (Geography + Keyword for example "Dunedin back pain") 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 in a friendly manner, remind them who you are and build rapport by asking questions.
3. Enlighten the client on the County Advisory Board 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).
4. Read the story to the client and make notes of any changes to the story. Edit after the appointment.
5. Towards the end of the story, you'll tell the client you need to know if they are taking on new customers and if they are, you'll include their phone number and website in the article. Find out how many more they can service and what is the average sale. You'll need this data later.
6. Complete the story and begin enlightening the prospect on what we do and hand them your pre-game. hand the client a one-page document on Company letterhead the lists 3-5 geo (geography) Keyword phrases that the client does not up in searches. For example, "Clearwater Back Pain". Let the client absorb the data and wait for them to speak.
7. Discuss that there is something wrong with the client's online marketing and it won't just fix itself.
8. Present that CMA as a solution to lost revenues, not showing up or whatever problem you discover.
9. Close the client on the CMA, get the payment, and complete the order form.
10. After every appointment, regardless if your presented, closed, etc. do the following in Highrise:
 - a. Check off the Spotlight task. Add any new follow up tasks.
 - b. Edit the Highrise business profile and any other new data to keep the profile current.
 - c. Add a note under the business's Latest Activity "Presentation Done – Sale", "Presentation Done – No Sale (why no sale)" or "No Presentation – (why no presentation)".



SPOTLIGHT EDITS

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.
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.



PREGAME

- 1) Review the client's website looking for sales opportunities and any notes in Highrise.
- 2) Review the Spotlight Story. Have a tab open with the story and be logged into CAB.
- 3) Discover a "Geo-Keyword" or two the client's website does not show up for. Ideally, they don't show up in Google Maps either. If time permits, the Create a brief ranking report, like the sample below on Company letterhead, which you can show the prospect at the appropriate time.
- 4) Have your screen share on and be logged into CAB so you can edit the story.
- 5) Have tabs open for the story, the search where the client does not show up for their Geo-Keyword, and a tab for the CMA order form.

EXAMPLE

JOE'S CHIRO CARE

www.JoesChiroCare.Com does not show up on Page #1 in Google for:

- **Clearwater Chiropractors**
- **Clearwater Back Pain**
- **Clearwater Headaches**

Note: Your Google My Business (GMB) profile may show up in Google Maps. This brief ranking report is based on your website's rankings, not your GMB profile.



MARKETING DIRECTIVE - CONFIDENTIAL

July 23, 2019

NEW CUSTOMER ACQUISITION 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. This is your opportunity to get your prospect communicating, engaged.
- C. Before, during and after the Spotlight, do through communication steps 1-6 below.

1. BUILD RAPPORT BY ASKING LIGHT, NON-THINKING QUESTIONS – Relationship Building

- **PROSPECT:** Prospects usually buy from those they like and are engaged with. If you want their prospect to like you, get them talking about themselves. What are their hobbies/interests? Married/kids? Training? How they started the business?
- **YOU:** You are going to ask for a payment over the phone, the prospect needs to know about you and feel they can trust you. So give them some data, some information about yourself.
- **EXPANSION SUPPORT SERVICES:** Give the client data about our company to begin building credibility. We want the client to know about our competitive advantages, which is why our company is different than and better than another company. We want the prospect to understand we are experts and not the same or similar to their employee, friend or family member that is working on the online marketing.

2. GET THE OWNER TO PUT ON OWNER'S HAT BY DISCUSSING BUSINESS GOALS, PURPOSES & AMBITIONS

- | | |
|--------------------------------------|------------------------------------|
| • How many staff | • Products and services offered |
| • How many locations | • Benefits of client's services |
| • How many customers? New customers? | • Annual revenues now? Ideal? |
| Capacity? | • 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.
- Upset with current marketing team.
- Not satisfied with results or costs of marketing team.
- Not enough time in the day/week.
- 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?

- The prospect must be engaged and verbalizing a problem. This is something that they are not satisfied with, something he/she wants to handle, or perhaps a goal they have not yet achieved. The client must be engaged, must be discussing this with you or it's not a real problem for the prospect.
- 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? For examples,
 - 1) Reduction in customers reduces income,
 - 2) Lack of income causes stress,
 - 3) Working late nightly takes away from family time.
- 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. THE CMA IS A SOLUTION TO THE DISCOVERED 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 contains.

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:** We use 2-way communication to enlighten the client on our research, marketing basics and recommendations. We want our clients to understand, and not be confused, about how to expand get more customers, and increase their income by using the internet. We want our clients to dominate the local online searches for their products & services.



SEQUENCE DRILL

Answer the questions below without hesitation. You must be conceptually correct, but do not need to give verbatim answers.

You'll go through the below questions over and over until you get them 100% correct from start to finish.

If you miss a question, have your coach show you the question and answer. You can also review the Directive to gain more insight. After missing a question and getting the answer, your coach will re-ask you the question and then continue to the end. You do not start over each time you miss a question.

Do this with a partner for practice and get a supervisor to check you out to pass.

1. What opportunity do you have when going over the Spotlight with a prospect?

This is your opportunity to get your prospect communicating, engaged.

2. How does one build rapport?

BUILD RAPPORT BY ASKING LIGHT, NON-THINKING QUESTIONS

3. Who do prospect usually buy from?

Prospects usually buy from those they like and are engaged with.

4. How do you get a prospect to like you?

If you want their prospect to like you, get them talking about themselves. What are their hobbies/interests? Married/kids? Training? How they started the business?

5. Why should you tell your prospect about you?

You are going to ask for a payment over the phone, the prospect needs to know about you and feel they can trust you. So give them some data, some information about yourself.

6. How would you describe a competitive advantage?

Our competitive advantages is why our company is different than and better than another company.



7. How do you help the business owner wear his owner's hat?

GET THE OWNER TO PUT ON OWNER'S HAT BY DISCUSSING BUSINESS GOALS, PURPOSES & AMBITIONS

8. Give 3 examples of business problems a business owner may consider that a CMA can help solve.

(any 3 below are acceptable answers)

- Not enough money
- Not enough new customers
- Credibility is lacking.
- Upset with current marketing team.
- Not satisfied with results or costs of marketing team.
- Not enough time in the day/week.
- 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)

9. How do you know the problem is real to the prospect?

The prospect must be engaged and verbalizing a problem. This is something that they are not satisfied with, something he/she wants to handle, or perhaps a goal they have not yet achieved. The client must be engaged, must be discussing this with you or it's not a real problem for the prospect.

10. Give an example of a business problem causing an effect.

- 1) Reduction in customers reduces income, 2) Lack of income causes stress, 3) Working late nightly takes away from family time.

11. What do you propose a CMA as a solution for?

THE CMA IS A SOLUTION TO THE DISCOVERED PROBLEM, BARRIER OR DISATISFACTION

12. What are the 5 features of a Competitive Marketing Analysis?

- Educate - Our intention is to educate!
- Strategic plan
- Solutions
- Consultation
- Research
 - Computer code of your website
 - Marketing and functionality of your website.
 - Online competitors
 - Market research



COMPANY DIRECTIVE - CONFIDENTIAL

Rev 10/30/2023

Instant Hat – Completing a Sale Over the Phone

DO WHILE WITH THE CLIENT...

1. Get the credit card or bank info for auto debit and complete the Payment Voucher.
2. Charge the card at ExpansionSupportServices.com/95cma or take Payment Voucher to Treasury Mgr.
3. Post the authorization code or PayPal acknowledgement the payment went through into HR.
4. Complete the Online Order form with the client at expansionsupportservices.com/cma.
5. Set the exact time and date to deliver the CMA within 2-4 business days choosing a time that all influencers and those that must be consulted on financial decisions will be at the CMA delivery.

IMMEDIATELY AFTER YOU COMPLETE THE MEETING...

6. Add the bank name, routing number and account number or CC info into Highrise. Using the “Show Options” click on “Who Else Can See this Note” and check Treasury Manager, Mimi Kintzel and Kurtis Kintzel.
7. Get the emailed order form from your email, download the form’s PDF and upload it into HR.
8. Generate a Geo-Keyword list at TopTal.com/marketing/mergewords. Post geo-keywords into Highrise.
9. Add into a HR note any other data you feel the person producing the CMA needs or may find useful. Too much data is better than not enough.
10. Edit/update the client’s HR 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”.
11. Create a Deal in HR for the CMA sales and mark it WON. If you feel confident (50% or better) the client will upsell in the next 30 days, create another Deal for Internet Marketing which will be Pending.
12. Add Tasks created in Highrise ensuring the task “categories” match the description of the task below.
 - a. Set a task for Sales Services to produce the CMA 24 hours before the delivery date.
 - b. Sets a task for the BC to do a confirmation call 24 hours in advance of the CMA delivery.
 - c. Sets a task for BC (and manager if needed) to delivery the CMA.
 - d. *Conditional* For ACH sales, set a task for Treasury Manager to process the payment.

Kurtis Kintzel
President