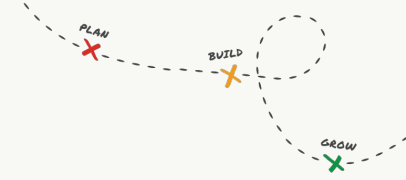


Outsourced Accounting Firm Growth Road Map Presentation



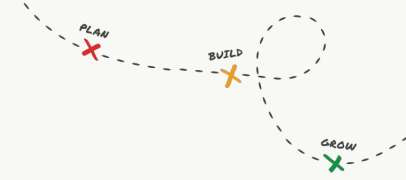
Company Overview

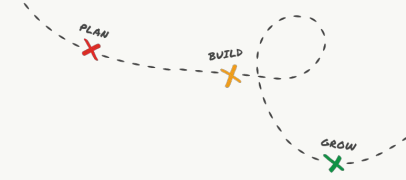


- Outsourced accounting firm established in 1996
- 1,000+ small to mid-market businesses served
- \$3.5MM in annual revenue, goal of \$4.5MM for next year
- 3 locations and 80+ full-time employees
- 3 core services: corporate accounting, family office accounting, bill pay services
- Industry expertise in Construction & Real Estate, Manufacturing & Distribution, e-Commerce, Professional Services, and Family Office
- Support NetSuite, Sage, and Quickbooks accounting platforms



The 30-Day Growth Road Map Project



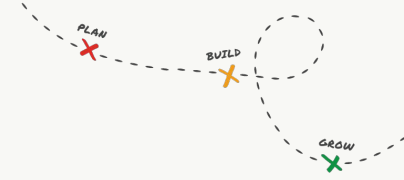


Growth Drivers

How many leads do you need to reach your growth goals and what can you afford to invest to get them?



Growth Drivers Phase



Step 1: Ideal Prospect Profile

Identify the traits that make a prospect a good fit for you



Step 2: Irresistible Offer

Frame your solution in your ideal prospects language

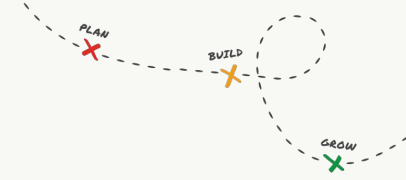


Step 3: 5X ROI Marketing Budget

Set a budget to achieve your revenue goal with a 5X ROI



Ideal Prospect Profile

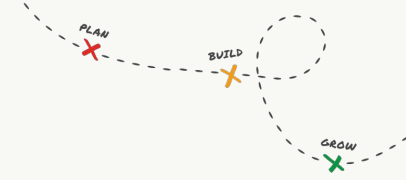


Target Audience Characteristics	Fit Acceptance Criteria
<ul style="list-style-type: none">• Industries: Construction & Real Estate, Manufacturing & Distribution, e-Commerce, Professional Services, and Family Office• Size: Small to mid-market (11-999 employees)• Job Titles: Owner, Partner, CEO, CFO, Controller• 70% have never used an outsourced accounting solution prior to contacting	<ul style="list-style-type: none">• Uses NetSuite, Sage, or QuickBooks software or is willing to migrate to one of those platforms• Has an approved budget of at least \$24,000• Operates in the United States• Must agree to payment & non-compete terms
Triggering Events	Fit Rejection Criteria
<ul style="list-style-type: none">• They are in an accounting crisis and need immediate help• They have staff transition/turnover• They are growing or shifting focus and need support• They want to upgrade/change the accounting software they use	<ul style="list-style-type: none">• Not using Sage, NetSuite or QuickBooks (and is not willing to migrate)• Not in one of the 5 target industries• Unapproved budget or budget of < \$24,000• Operates outside of the United States



The company has a clear profile for fit and non-fit clients

Irresistible Offer



Provides industry-specific accounting tools, systems, and support to small and mid-market businesses so they can achieve complete, accurate, and useful financial reporting in 60 days or less

Company-stated differentiators

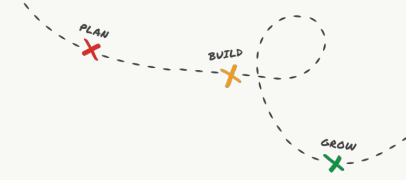
- Certified partners for Netsuite, Sage & Quickbooks
- Focus on 5 key industries
- Go “beyond the numbers”
- 25+ years in business
- 1,000+ companies served

Client-stated differentiators

- Feels like an extension of our team
- Knows our industry better than we do
- Provides value & insights over time (ex: after 4 years)



5X ROI Marketing Calculator



Marketing Budget Calculator

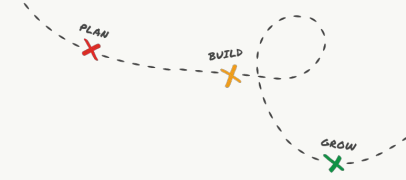
Notes

\$ New Business Revenue Goal	\$1,000,000	Based on client-provided goal
\$ Typical Client Revenue Value	\$42,000	Based on \$3,500 per month average provided by client
# New Clients Needed	24	Calculated based on average annual client value
% Sales Opportunity Win Rate	20%	Client provided average was 31% for 2022, adjusted for conservative estimate
# New Sales Opportunities Needed	120	Calculated based on new clients needed and assumed opportunity win rate
% Qualified Leads	50%	Client-provided average of 37%, adjusted to 50% based on assumed improvement
# New Sales Leads Needed	240	Calculated based on qualified sales leads needed and assumed lead quality %
Target ROI	5	Your marketing investment should return a minimum of 5X revenue
\$ Maximum Marketing Budget	\$200,000	Calculated maximum you should invest to achieve at least a 5X ROI



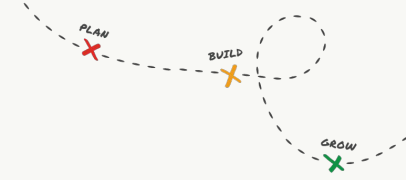
Need 240 leads to hit your goal and you should invest no more than \$200k to get there

Growth Driver Summary



Develop an inbound lead generation strategy
that generates **20 leads per month** for
outsourced accounting from contacts that fit
the ideal prospect profile with a marketing
budget not to exceed \$200,000



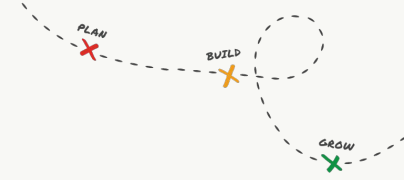


Market Research

Which channels will work best to reach your ideal prospects at or below your target cost?



Market Research Phase



Step 4: Target Audience Pool

Research your target audience & how many you can reach



Step 5: Competitive Intelligence

Discover the marketing tactics your top competitors are using

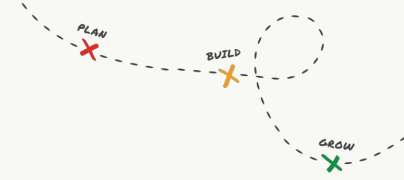


Step 6: High Yield Channels

Isolate the marketing channels that work best for your goals



LinkedIn Audience Research



INCLUDE

People with **English** as their profile language in:

Locations (Recent or Permanent)

United States

AND who meet ANY of the following criteria:

Job Titles (Current)

Chief Executive Officer, Group Chief Executive Officer, Principal Chief Executive Officer, Acting Chief Executive Officer, Interim Chief Executive Officer, Chief Financial Officer, Deputy Chief Financial Officer, Acting Chief Financial Officer, Division Chief Financial Officer, Regional Chief Financial Officer, Consulting Chief Financial Officer, Financial Controller, Controller, Corporate Controller, Business Controller, Senior Business Controller, Financial Business Controller, Owner, Co-Owner, Principal Owner, Partner, Managing Partner

AND who meet ANY of the following criteria:

Company Industries

Construction, Real Estate, Manufacturing, Medical Equipment Manufacturing, Transportation, Logistics, Supply Chain and Storage, Online and Mail Order Retail, Professional Services

AND who meet ANY of the following criteria:

Company Size

11-50 employees, 51-200 employees, 201-500 employees, 501-1000 employees

Forecasted results



Target audience size

1,400,000+

Segment breakdown

Company size ▾

11-50 employees	57%
51-200 employees	26%
2-10 employees	14%
201-500 employees	14%
501-1000 employees	9%

[Hide segments](#)

1-day

7-day

30-day

30-day spend

\$1,700.00 - \$3,000.00

30-day Impressions

73,000 - 200,000

CTR

0.43% - 0.66%

30-day clicks **Key Result**

450 - 1,300

30-day cost per click

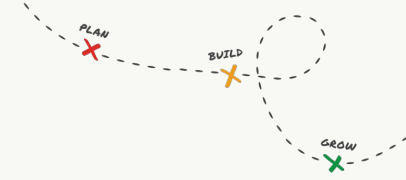
\$3.30 - \$4.95

Forecasted results are directional estimates and do not guarantee performance. [Learn more](#)



There are at least 1.4MM people that match your target audience profile

Keyword Research



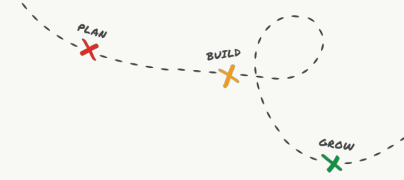
Alignment Group	Keyword Group	# Keywords	# Monthly Searches	\$ Cost per Click
[-] Accounting Services	Accounting	307	167,470	\$15.36
	Bookkeeping	154	71,690	\$17.07
	Fractional CFO/Controller	14	2,520	\$21.66
	Consulting	5	360	\$17.95
Accounting Services Total		480	242,040	\$16.13
[-] Target Software + Accounting Services	QuickBooks Consulting	18	10,720	\$15.71
	QuickBooks Accounting	5	10,310	\$15.20
	Sage Accounting	3	3,620	\$38.82
	NetSuite Consulting	19	2,360	\$37.63
	QuickBooks Bookkeeping	8	1,180	\$17.41
	Sage Consulting	6	740	\$23.65
	NetSuite Bookkeeping	2	140	\$62.18
	NetSuite Accounting	2	70	\$61.55
Target Software + Accounting Services Total		63	29,140	\$27.50
[-] Target Segment + Accounting Services	Construction Accounting	31	2,590	\$18.43
	Personal Accounting	3	1,630	\$10.43
	Personal Bookkeeping	3	590	\$11.87
	eCommerce Accounting	7	370	\$24.96
	eCommerce Bookkeeping	1	320	\$22.34
	Professional Services Accounting	6	250	\$15.50
	Construction Bookkeeping	2	210	\$33.46
	Manufacturing Accounting	6	100	\$43.73
	Construction Consulting	2	30	\$17.24
Target Segment + Accounting Services Total		61	6,090	\$19.44
Grand Total		604	277,270	\$17.61

Note: search volume is up 23% year-on-year for this group of keywords



There are 277k relevant searches every month & 35k align with your target profile

Market Share Analysis



Domain	Traffic ↓	Keywords	Pages
1 intuit.com ▼	3,956 30% <div></div>	62	85
2 netsuite.com ▼	795 6% <div></div>	47	40
3 yelp.com ▼	570 4% <div></div>	38	24
4 thumbtack.com ▼	396 3% <div></div>	26	5
5 upwork.com ▼	254 2% <div></div>	37	15
6 bookstime.com ▼	227 2% <div></div>	23	7
7 fourlane.com ▼	222 2% <div></div>	41	17
8 indeed.com ▼	185 1% <div></div>	78	61
9 therealestatecpa.com ▼	175 1% <div></div>	9	9
10 fitsmallbusiness.com ▼	166 1% <div></div>	44	14
11 clutch.co ▼	148 1% <div></div>	36	15
12 nerdwallet.com ▼	124 1% <div></div>	46	13
13 bark.com ▼	123 1% <div></div>	5	6
14 extensiv.com ▼	117 1% <div></div>	4	2
15 g2.com ▼	117 1% <div></div>	36	14
16 azdan.com ▼	112 1% <div></div>	12	3
17 ziprecruiter.com ▼	109 1% <div></div>	46	39
18 sage.com ▼	103 1% <div></div>	33	23
19 1-pas.com ▼	102 1% <div></div>	1	1
20 bbb.org ▼	97 1% <div></div>	4	3

Aggregated SERP for Top 100+ keywords:

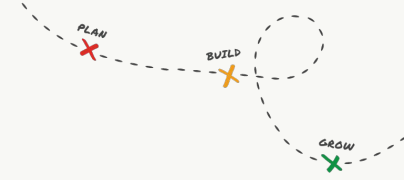
- Software platforms command 37% of the search share, with Intuit & NetSuite lead in positions 1 & 2
- National & Industry directories such as Yelp and Thumbtack take the next largest share at a combined 12%
- None of your identified direct competitors rank in the top 20, but there are 3 outsourced accounting companies that together comprise 5% of share
- Job boards such as Indeed and Freelance platforms like UpWork are also in the mix

Your Share Numbers

- Aggregate position of #82
- Website ranks for 20 of top 100 keywords



Competitor Traffic Profiles



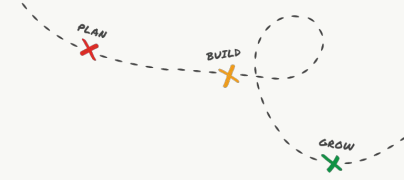
			Traffic by Source						
Website Domain		Est. Traffic per Month	Direct Traffic	Email Traffic	Referral Traffic	Social Traffic	Organic Search Traffic	Paid Search Ad Traffic	Display Ad Traffic
1	intuit.com	128,100,000	67.1%	7.3%	2.0%	2.6%	17.7%	2.9%	0.3%
2	netsuite.com	14,080,000	65.7%	3.9%	14.7%	0.9%	13.1%	0.9%	0.9%
3	yelp.com	132,900,000	23.0%	0.3%	2.0%	0.5%	74.1%	0.1%	0.0%
4	thumbtack.com	6,090,000	33.8%	0.8%	3.5%	3.3%	48.0%	9.6%	0.2%
5	upwork.com	46,060,000	73.7%	3.8%	0.8%	3.3%	16.8%	1.6%	0.1%
6	bookstime.com	28,710	25.5%						
7	fourlane.com	26,805	27.2%						
8	indeed.com	526,600,000	40.8%						
9	therealestatecpa.com	29,961	20.3%						
10	fitsmallbusiness.com	1,477,777	16.0%						
Top SERP Competitors		85,539,325	39.3%						
56	growthforce.com	55,850	19.5%						
79	scalenorth.com	4,072	83.2%						
455	pilot.com	113,802	60.2%						
n/a	escalon.services	20,212	38.2%						
n/a	tgg-accounting.com	9,819	48.3%						
n/a	signatureanalytics.com	15,696	53.5%						
Top Direct Competitors		33,881	41.8%						

	Your Website	Top Direct Competitors	Top 20 SERP Competitors
Monthly Web Traffic	5,239	33,881	85,539,325
% Organic Search	59.6%	46.6%	48.4%
% Direct	25.2%	41.8%	39.3%
% Referral	5.0%	1.6%	3.0%
% Paid Search	7.3%	6.6%	4.3%
% Email	0.3%	0.7%	2.3%
% Social	2.3%	2.5%	2.3%
% Display Ads	0.0%	0.3%	0.3%
Website Engagement			
Pages per Visit	1.72	2.18	6.26
Session Duration	0:01:04	0:02:47	0:06:32
Bounce Rate	73.7%	62.6%	49.1%



Traffic profile is aligned, however volume and engagement lag competition

Direct Competitor Share by Keyword Group



12 tags	Share of Voice %	Traffic									
Tag	www.thi... ↓	escalon.s...	scalenort...	tgg-acco...	signature...	growthfor...	pilot.com/	bookstim...	fourlane.c...	therealest...	
netsuite	0.93 +0.93	0	1.05 +1.05	0	0	0	0	0	0.64 +0.64	0	
consultant	0.31 +0.31	0	0.10 +0.10	0	0	0.50 +0.50	0	0	1.95 +1.95	0.01 +0.01	
accountant	0.05 +0.05	0	0.08 +0.08	0	0	0	0	0.85 +0.85	0.44 +0.44	4.13 +4.13	
quickbooks	0.03 +0.03	0	0	0	0	0.65 +0.65	0	0.01 +0.01	3.49 +3.49	0	
sage	0.01 +0.01	0	0	0	0	0	0	0	0	0	
construction	0	0	0	0	0	0	0	3.38 +3.38	0	0	
bookkeeper	0	0	0.98 +0.98	0	0	0.03 +0.03	0.07 +0.07	12.51 +12.51	3.68 +3.68	0	
ecommerce	0	0	0	0	0	0	0.25 +0.25	0.03 +0.03	0	0	
manufacturing	0	0	0	0	0	0	0	0	0	0	
personal	0	0	0	0	0	0	0	12.09 +12.09	0	0	
professional services	0	0	0	0	0	0	0	0	0	0	
real estate	0	0	0	0	0	0	0	0	0	17.48 +17.48	



Target Software + Accounting Service Combo seems the best near term strategy

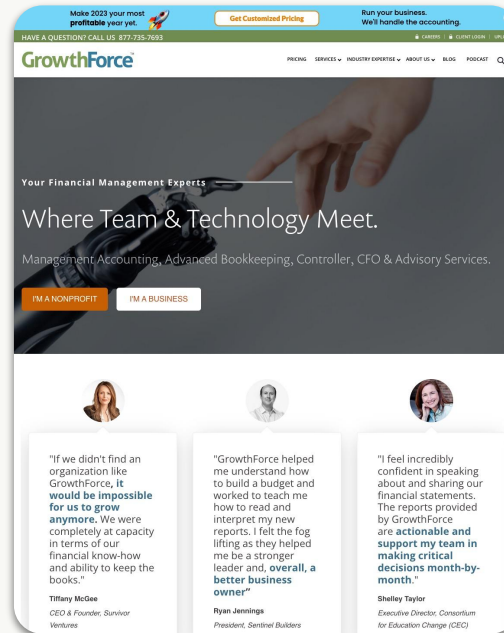
Competitor Website Review

scalenorth.com



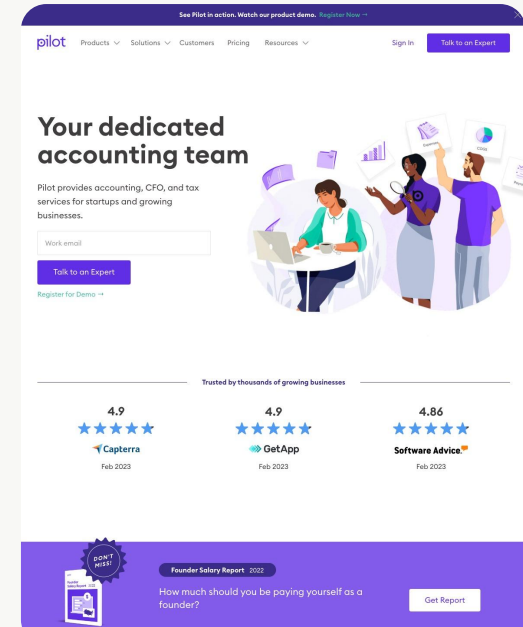
- + Optimized for NetSuite keywords
- + Great trust symbols & social proof
- + 50+ blog articles
- No primary call-to-action (CTA)
- Company-centric messaging
- Inconsistent design/branding

growthforce.com



- + Optimized for accounting keywords
- + Custom pricing as primary CTA
- + Extensive resource library
- No actual pricing info available
- “Growth Bee” chat tool is not a great user experience

pilot.com



- + SAAS-like positioning
- + Easy to understand pricing
- + Primary and secondary CTAs
- + Extensive resource library
- Not clear on main pages that they only work on Quickbooks



Channel Benchmarks

ScaleNorth
7,000 followers
Promoted

Our certified NetSuite consultants & CPAs optimize NetSuite accounting & finance services. <https://lnkd.in/g/ScaleNorth>

SCALENORTH

NetSuite Consultants & Outsourced Accountants

- Optimizations
- Customizations
- Third-Party Integrations
- Bookkeeping
- Fractional Controllers
- More

ORACLE NETSUITE BPO Partner ORACLE NETSUITE Solution Provider ORACLE NETSUITE SuiteCloud Developer Network

NetSuite Consultants & CPAs | Boost your efficiency by optimizing NetSuite and outsourcing your accounting... [Learn more](#)

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NetSuite Accounting Services - NetSuite Accounting

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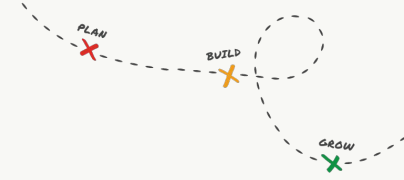
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Receive a Dedicated Manager & Detailed Monthly Reports. Accurate, Consistent **Accounting**. Get Your Books Done Right With Pilot. Focus 100% on Making Your Business... [Pilot FAQs](#) · [Pilot Pricing Plans](#) · [Expert CFO Services](#) · [Weekly Demo and Q&A](#) · [How It Works](#)

Channel	Est. Impressions	Click-thru Rate (CTR)*	Est. Ad Clicks	Conversion Rate (CVR)*	Est. Leads	Cost per Click (CPC)*	Est. Ad Spend	Cost per Lead
Google Search Ads	35,000	5.7%	1,995	6%	120	\$4.57	\$9,120	\$76
Google Display Ads	340,000	0.5%	1,768	1%	18	\$0.86	\$1,520	\$84
LinkedIn Ads	136,500	0.6%	750	5%	38	\$4.12	\$3,100	\$82
Facebook Ads	100,000	1.0%	1,000	5%	50	\$3.77	\$3,770	\$75
Organic Search	277,000	1.5%	4,155	3%	125	\$2.25	\$9,350	\$75



Paid & Organic Search represent the highest lead volume and lowest cost per lead

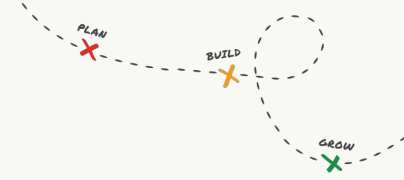


Growth Action Plan

What is the marketing plan, budget, and metrics needed to hit your 12-month revenue goal?



Growth Action Plan Phase



Step 7: Marketing System Audit

Audit the current system to identify key problems and opportunities



Step 8: Marketing Plan

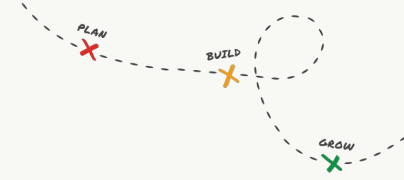
Plan the exact steps needed for the next year to reach your goal



Step 9: Key Performance Metrics

Identify the metrics you need to know your plan is working

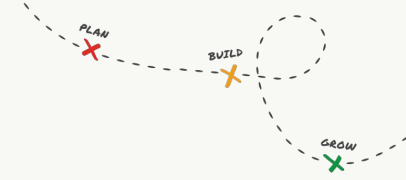





Marketing System Audit



Analytics Audit



	Acquisition			Behavior			Conversions		
	Sessions ↓	Users ↓	New Users ↓	Bounce Rate ↓	Pages / Session ↓	Avg. Session Duration ↓	Goal Completions ↓	Goal Value ↓	Goal Conversion Rate ↓
	62,871	51,910	51,943	73.72%	1.72	00:01:04	195	\$0.00	0.31%
1  Organic Search	37,480	<div><div></div></div>		74.02%	<div><div></div></div>		107	<div><div></div></div>	
2  Direct	15,868	<div><div></div></div>		80.00%	<div><div></div></div>		25	<div><div></div></div>	
3  Paid Search	4,616	<div><div></div></div>		85.51%	<div><div></div></div>		14	<div><div></div></div>	
4  Referral	3,156	<div><div></div></div>		29.75%	<div><div></div></div>		37	<div><div></div></div>	
5  Social	1,416	<div><div></div></div>		55.30%	<div><div></div></div>		5	<div><div></div></div>	

Traffic

- Organic search is leading source of traffic, driven by blog content
- Direct is the second largest channel, with most traffic to the home page
- Paid search is third largest channel, driven by NetSuite, General Accounting Services, and Construction Accounting keywords



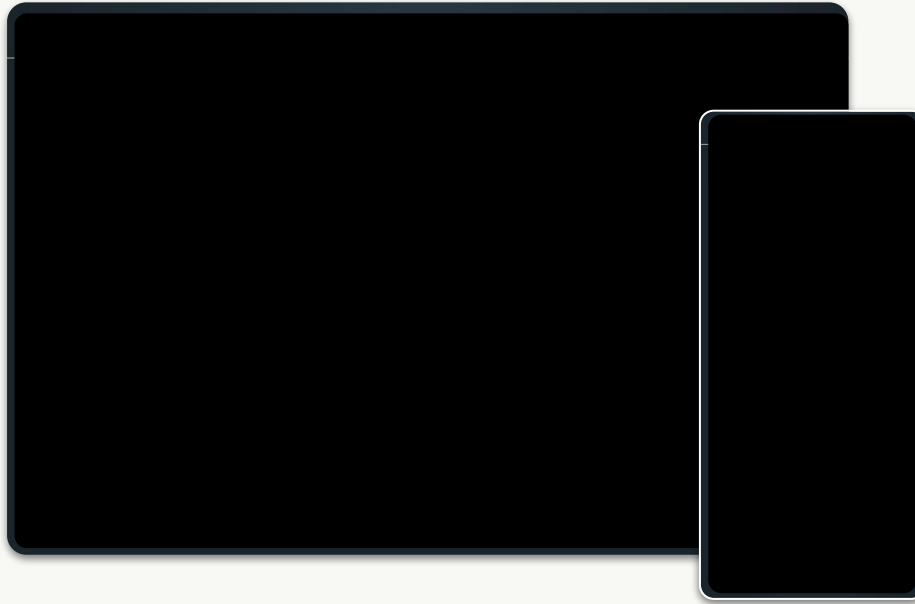
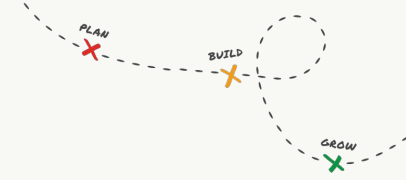
Engagement

- Bounce rate, pages per session, and average session duration are low compared to competitive benchmarks
- Engagement is particularly low on paid search, which should perform the best

Conversions

- Conversion rate due to mix of blog traffic
- Conversion rates are good on key sales pages for both organic and paid search
- 42% of conversions involve 2+ channel interactions

Website Audit



User Experience | **PASSED**

Design is clean, navigation is logical and user-friendly, content is optimized for mobile

Search Engine Optimization | **MISSED OPPTYS**

Many pages load slowly, there are issues with duplicate content, and content tagging is not optimized

Content Inventory | **NEEDS WORK**

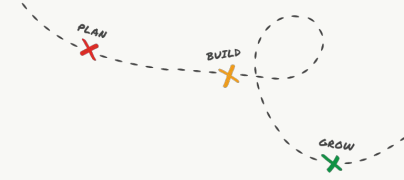
Good foundation of sales pages and informational content; key opportunities to optimize for conversion and search, better integrate supporting resources, and add video and more personalized images

Conversion Optimization | **MISSED OPPTYS**

Opportunity to optimize calls-to-action and encourage conversion with improved form pages

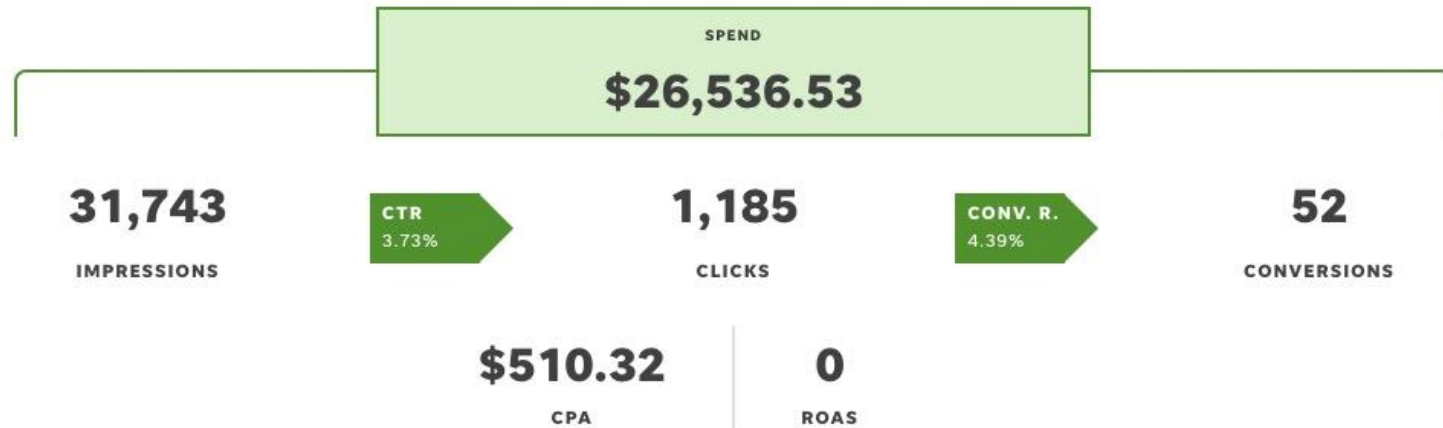


Ad Campaign Audit



Search

The metrics below were generated from Search campaigns in your account for the last 90 days.



Account Organization

- Sound campaign structure
- Opportunity to create more distinct, targeted ad groups
- Account is actively managed, including negatives

Account Performance

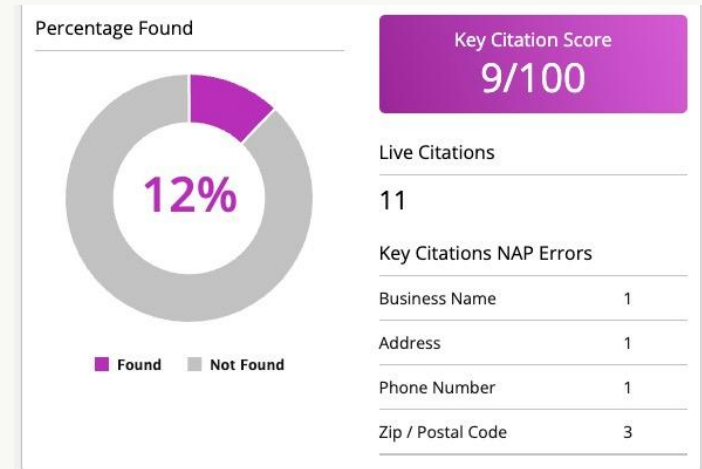
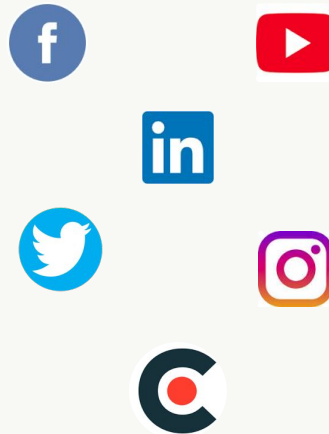
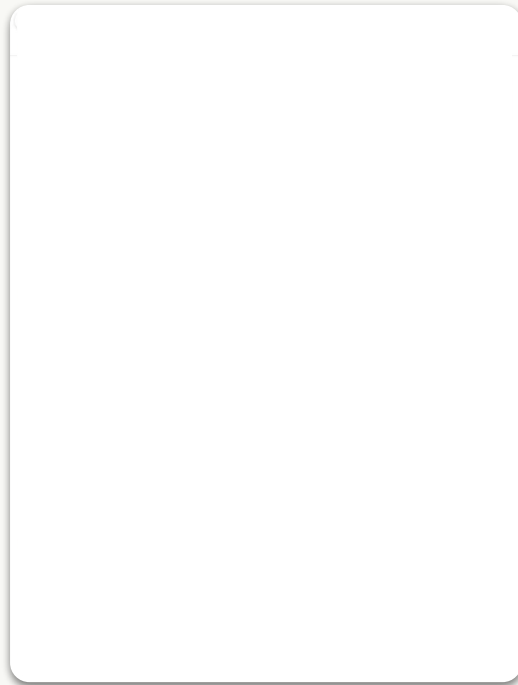
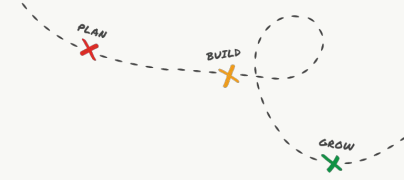
- Ad rank is very low, driving your costs up
- Keyword quality scores are very low
- Conversion rate is decent, but lower than industry average

Ads & Landing Pages

- Multiple ads are running per ad group, which is good
- Lot of variance on click-thru rates, opportunity to optimize
- Landing pages need work, especially Construction, as there have been no leads



Online Presence Audit



Branded Search Results

- Brand name inconsistency
- Missing LinkedIn Profile
- Few/low Google Reviews

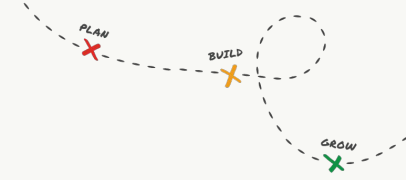
Key Social/Industry Profiles

- Decent following and post activity on LinkedIn, however, low engagement
- YouTube following and engagement is decent, but focused only on software
- Low engagement on Twitter and Facebook profiles

Business Directory Profiles

- Google Business Profile is not fully optimized
- Very low citation count
- Name & Address inconsistencies

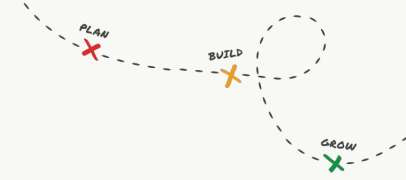




Marketing Plan



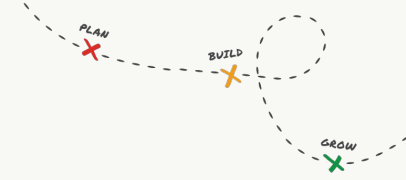
Growth Driver Recap



Develop an inbound lead generation strategy
that generates **20 leads per month** for
outsourced accounting from contacts that fit
the ideal prospect profile with a marketing
budget not to exceed \$200,000



Growth Strategy



Traffic

- Optimize paid search ad performance for high intent keywords
- Audit & optimize existing sales pages for high intent keywords
- Audit & optimize existing blog articles for related keywords
- Create new sales, blog, and video content
- Gain more links to improve rankings & drive referral traffic

Conversion

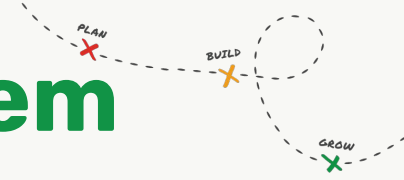
- Optimize existing sales pages for conversion
- Create hybrid booking form and use as primary CTA
- Develop lead magnets for use as secondary CTAs

Retargeting

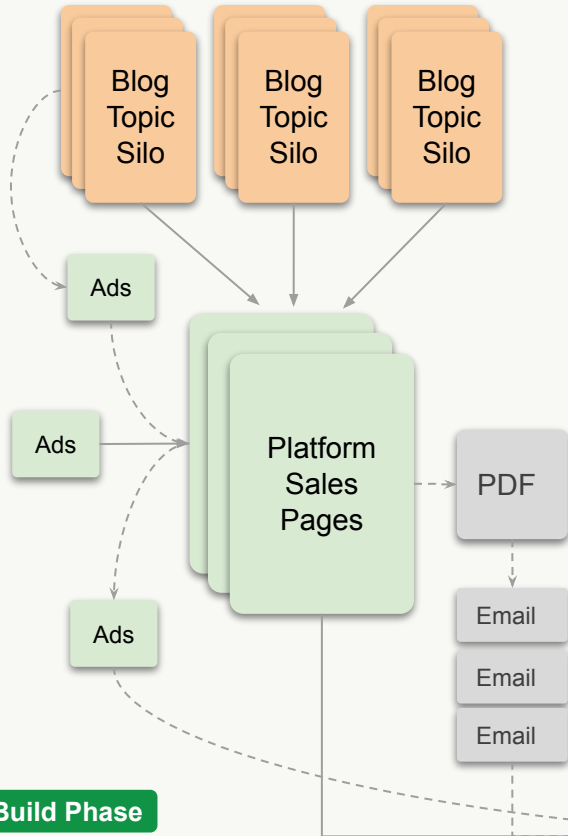
- Utilize retargeting ads on Google & LinkedIn
- Expand email sequences to nurture leads



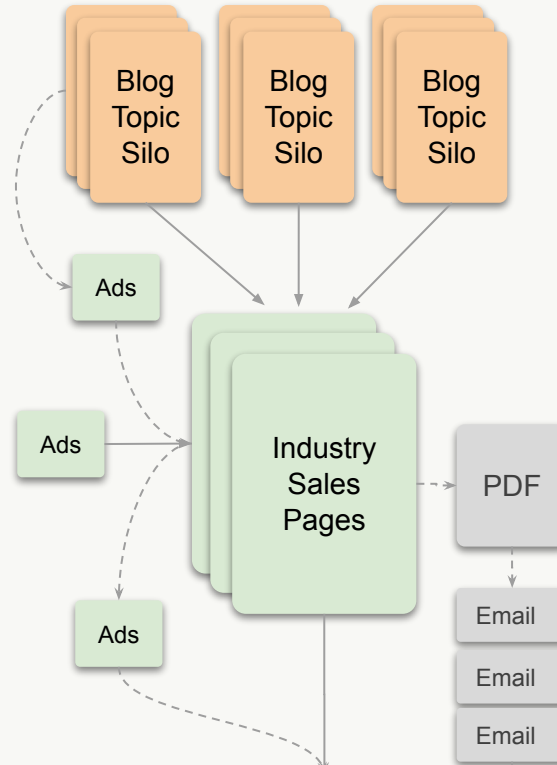
Proposed Inbound Lead System



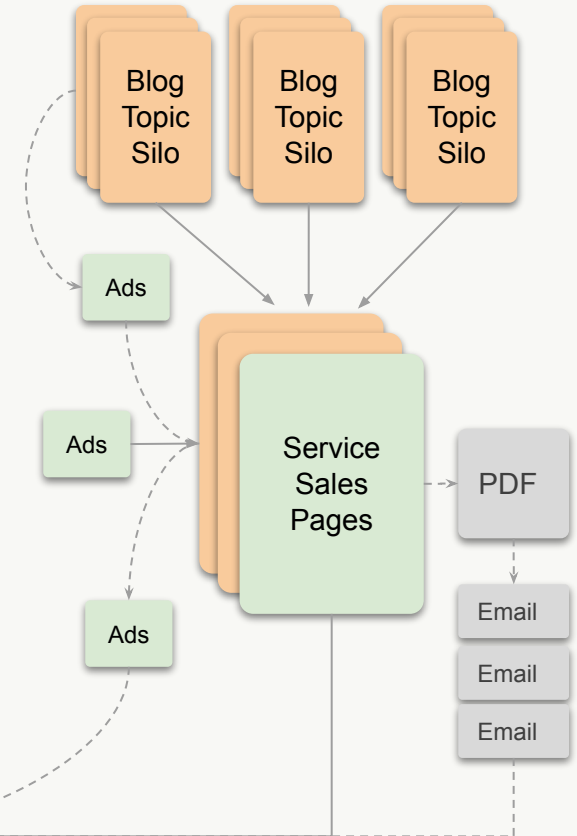
Platform Funnel



Segment Funnel



Platform Funnel



Build Phase

Grow Phase

Future Idea

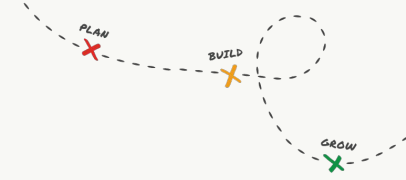


Hybrid
Booking
Form

Email
Email
Email

Initial
Sales Call

Marketing Projections

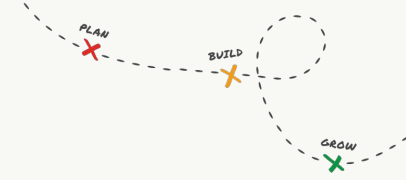


	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023 Total	Annualized
Website Traffic	5,290	5,955	7,266	7,471	21,086	28,483
Organic Search	2,500	2,500	2,750	2,875	10,625	11,500
Direct	1,080	1,080	1,188	1,242	1,296	4,968
Paid Search	1,125	1,400	1,400	1,400	5,325	4,200
Referral	525	525	578	604	630	2,415
Social	60	200	600	600	1,460	2,400
Display	0	250	750	750	1,750	3,000
Website Leads	36	42	56	70	204	239
Sales Opportunities	18	21	28	35	102	119
Won Opportunities	4	4	6	7	20	24
Annual Revenue	\$168,000	\$168,000	\$252,000	\$294,000	\$840,000	\$1,008,000
Marketing Services Fees	\$4,500	\$24,900	\$18,000	\$18,000	\$78,900	\$72,000
Advertising Spend	\$30,000	\$27,000	\$29,000	\$30,000	\$116,000	\$120,000
Total Marketing Investment	\$34,500	\$51,900	\$47,000	\$48,000	\$194,900	\$192,000
Return on Investment	4.9	3.2	5.4	6.1	4.3	5.3



Projections align with lead goals and budget, as well as target ROI

Marketing Budget Details



Build Phase:

Occurs over a 3-month period

Costs: \$24,900 paid in 3 installments

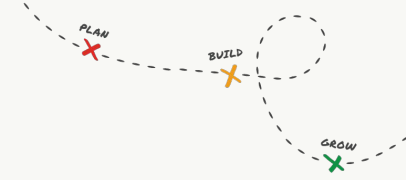
Grow Phase:

Ongoing monthly services

Marketing Services: \$6,000 per month

Ad Spend: \$10,000 per month





Build Phase Plan



Branding Work

- Buyer Personas
- Brandscript
- Brand Messages
- Ad Creative Templates

Sherry
45 - San Diego, CA
VP of Innovation

Primary Ideal Customer Profile

Demographics

- Woman
- Married
- 2 kids & dogs
- \$150K income
- Master degree
- Long-term CU employee
- Tends to fly under the radar
- Respected by executives and peers as a wise decision maker

Personality

- Friendly, curious, discerning
- Self-aware/confident
- Good sense of humor
- Long-term thinker
- Good listener and patient

Likes

- Reading
- Family-time
- Shopping with Stitch-fix
- Asking questions
- Productive conversations
- Understanding the "Why" of

Goals

Give her stakeholders ability to make better data-driven decisions by finding consultant/service to help unify her CU data into analytical dashboards.

Objections/Barriers

- She has never worked on a data-related project and is unfamiliar with the process and language
- Concerned that CFS costs will be too high and timeline too long to solve immediate insight problem
- Unclear what tangible value CFS solution will bring to her stakeholders
- Unsure what the working relationship with CFS will be
- Privately, she's concerned that CFS will receive credit for her efforts to innovate

Purchasing Role

- Organizer of information, but presents to C-level executive team
- Knows what executives want and is respected for her ability to find good solutions.

Challenges/Pain Points

- Trouble using internal resources to integrate 3rd party sources
- Internal data/IT resources are too busy

Bio

Sherry has held numerous roles in the credit union is well rounded in her understanding of how the credit union works. She is greatly respected by peers and senior management and

CFS Insight knows that you want to be a thriving, respected IT manager at your credit union. You want to be the go-to resource for all things data-related. But, in order to do that, you need to get all your other projects under control and figure out how to get your data integrated and organized. The problem is that you are overloaded, understaffed, and constantly helping your team battle other complex development problems. Stressed out and frustrated, you empathize why turnover is so high for your industry.

CFS Insight believes your role in the credit union industry is key to keeping these community-focused establishments competitive with the growing online options. CFS understands that beneath the surface of your business, information is the key making profitable, data driven decisions. But, credit union technology is becoming increasingly complicated and data integration and analytics is a never-ending battle between unrelated systems. CFS's credit union solutions provide the dual expertise in software development and the credit union acumen to help you overcome your toughest data challenge.

Data Connectors, CU Analytics Platform, and cutting edge and practical to implement. These ground up for people like you. People who want meaningful data from key systems is crucial efficiently and develop deeper member relationships. To meet your project goals, CFS will help you by providing transparent solutions. These solutions help your team to build further or reapply to other projects.

Define your goals:

- Schedule a demo call and view a demo
- Review and approve agreement
- Onboard CFS team
- Provide training, and transition solution to

SAMPLE MESSAGE

Emotional Relief

How the product/service helps avoid a negative emotion.

The team of experts at CFS will provide you relief to focus on other

SAMPLE MESSAGE

Positive Objective

How the product/service helps positively achieve an objective.

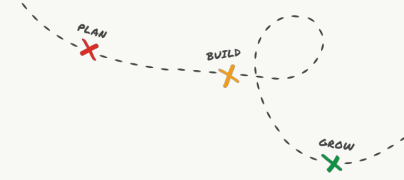
Finally discover the power of your credit union's 3rd party data when you see how CFS Insight makes analytics accessible and practical.

See more benefit responses [here](#)



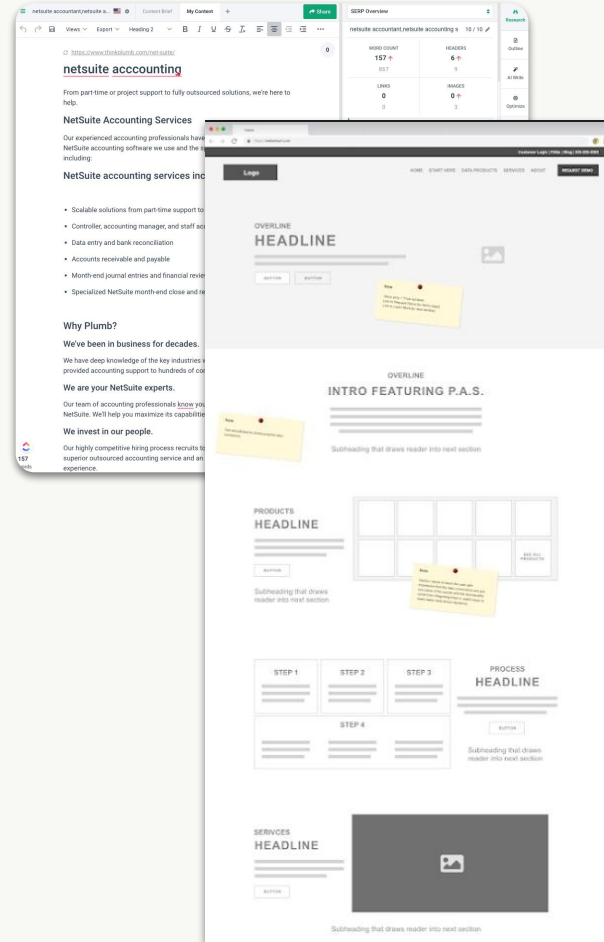
Brand Messaging Guide Will Set Messaging Direction for Sales Pages, Ads & Emails

Sales Content Optimization



Optimize Key Sales Pages

- NetSuite Expertise Page
- Sage Expertise Page
- QuickBooks Expertise Page
- Construction & Real Estate
- eCommerce
- Manufacturing & Distribution
- Professional Services
- Outsourced Accounting Services



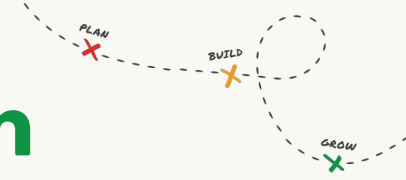
Content Optimization Workflow

- Review web analytics
- Conduct SERP analysis
- Researched outline
- Edit/expand copy
- Improved layout
- Technical SEO review



Goal is a page that attracts, engages & converts ideal prospects

Supporting Content Optimization



Create Pricing Page

Improve About Page

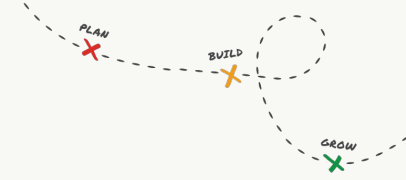
Integrate featured Case Studies

Create and integrate FAQs with FAQ schema



Goal is to address key questions & objectives for prospects in consideration stage

Conversion Optimization



Improve header & footer

- Phone number
- Locations
- Primary CTA button

Improve Primary CTA

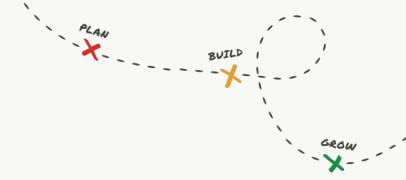
- Standardize primary call-to-action
- Create hybrid booking form
- Improve form page layout

Review/update CTAs on Sales Pages



Goal is to make it simple & easy for sales-ready prospects to convert while also providing sales staff with qualifying information

Technical SEO Setup



Address slow page speed

- Review & optimize hosting
- Implement code optimization (WP Rocket)
- Implement image optimization (WP Smush Pro)
- Review specific pages & optimize (as needed)

Review/update Main Pages

- Install and configure SEO plugin (Rank Math)
- Address multiple H1s
- Address missing meta descriptions
- Review and optimize meta titles

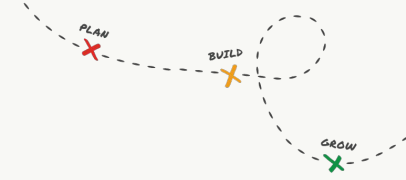
Review & update URL redirects

Create and integrate FAQ schema block



Goal is to increase search visibility by addressing key issues & opportunities

PPC Ad Campaign Setup



Paid Search Ads

- Supplement keywords based on research
- Create more distinct ad groups
- Update/align ad copy with keywords
- Test improved sales pages

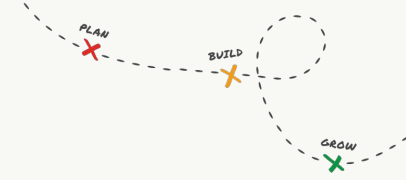
Retargeting Ads

- Create retargeting campaign on Google Ads
- Create retargeting campaign on LinkedIn Ads
- Create retargeting campaign on Facebook Ads



Goal is to increase conversions for highly aligned keywords & prior website visitors

Lead Nurturing Plan



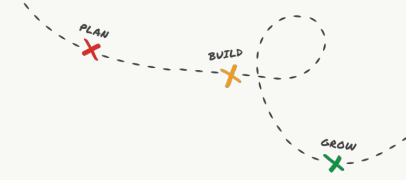
Work with client to develop email series to help education and prepare prospects for sales call:

1. Proven Process
2. Address FAQs
3. Featured Case Study



Goal is to increase win rates by staying in touch with prospects before sales calls

Tracking & Analytics Plan



Review & update Google Analytics settings

Update conversion events and import to Google Ads

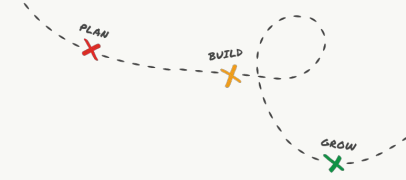
Improve tracking script consistency across primary domain and subdomains

Setup monthly reporting dashboard to align with key performance metrics (incl. Hubspot pipeline)



Goal is to have clarity on traffic and lead volume by channel

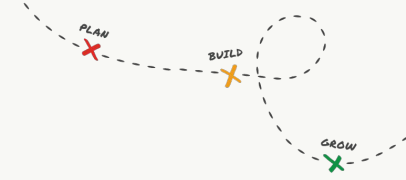
Project Management



- Internal & Client Kickoff Meetings
- Company Profile & Login Inventory
- Brand Discovery Meeting
- Content Review Meetings
- Weekly Client Progress Updates



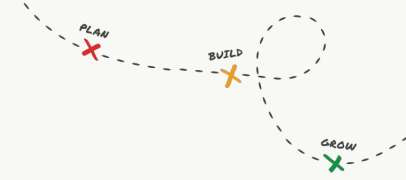
You will have a dedicated project manager with access to our full team



Grow Phase Plan



Ongoing Content Development



Drive bottom of funnel traffic to landing pages

- Review and optimize existing pages
- Create distinct services pages (ex: accounts payable)
- Create service area pages (ex: San Diego accountants)

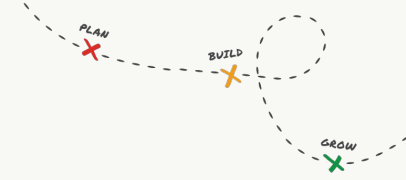
Drive top of funnel traffic to blog articles

- How to [accounting task] for [industry]
- [Industry name] + [case study]
- Cost of [accounting service]
- Cost of [accounting software]
- [accounting software] vs. [accounting software]
- [outsourced function] vs. [alternative model]
- [accounting role] vs. [accounting role]
- How to find [accounting role]
- What does a [accounting role] do?



Goal would be to optimize or create 2+ pieces of content per month; we could move faster if client team is providing the copy

Online Presence Expansion



Citation Site	Domain Authority
Top Search/Map Engines	
maps.apple.com	100
google.com	100
bing.com	96
local.yahoo.com	93
yelp.com	93
Top Social Platforms	
facebook.com	100
linkedin.com	100
instagram.com	100
twitter.com	100
youtube.com	100
Local Data Aggregators	
foursquare.com	92
data-axle.com/	78
neustarlocaleze.biz	90
yellowpages.com	90
GPS network	n/a
Industry Directories	
Clutch.co	89
Nerdwallet.com	90
G2.com	90

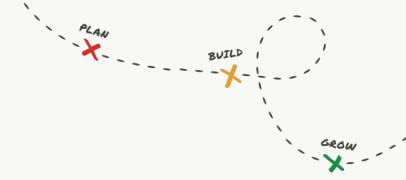
Citation Site	Domain Authority
bbb.org	91
mapquest.com	89
here.com	87
city-data.com	86
manta.com	85
tomtom.com	81
nextdoor.com	78
merchantcircle.com	77
justlanded.com	77
angi.com	76
citysearch.com	76
superpages.com	75
company.com	69
us.kompass.com	68
local.com	66
elocal.com	66
storeboard.com	66
brownbook.net	61
chamberofcommerce.com	61
spoke.com	60
	59

Citation Site	Domain Authority
infobel.com	59
yellowbook.com	58
hotfrog.com	58
yellowbot.com	57
insiderpages.com	57
tupalo.com	57
ezlocal.com	56
botw.org	56
ebusinesspages.com	56
cybo.com	54
showmelocal.com	54
yellow.place	53
salespider.com	52
ibegin.com	51
citysquares.com	50
n49.com	50
us.enrollbusiness.com	49
2findlocal.com	48
neustarlocaleze.biz	48
yasabe.com	47
golocal247.com	46
cylex.us.com	45
	45



Goal is to create a complete and consistent presence on top directories

Link Building Campaigns



- Conduct SERP analysis & competitor intersect research to find link building opportunities
- Qualify opportunities based on rankings, traffic, industry relevance, etc.
- Conduct outreach to website contacts and pitch ideas (suggest resource, contribute post, etc.)
- Arrange content and coordinate placements

Examples from Initial Research

fitsmallbusiness.com

biggerpockets.com

accountingtools.com

investopedia.com

constructionexec.com

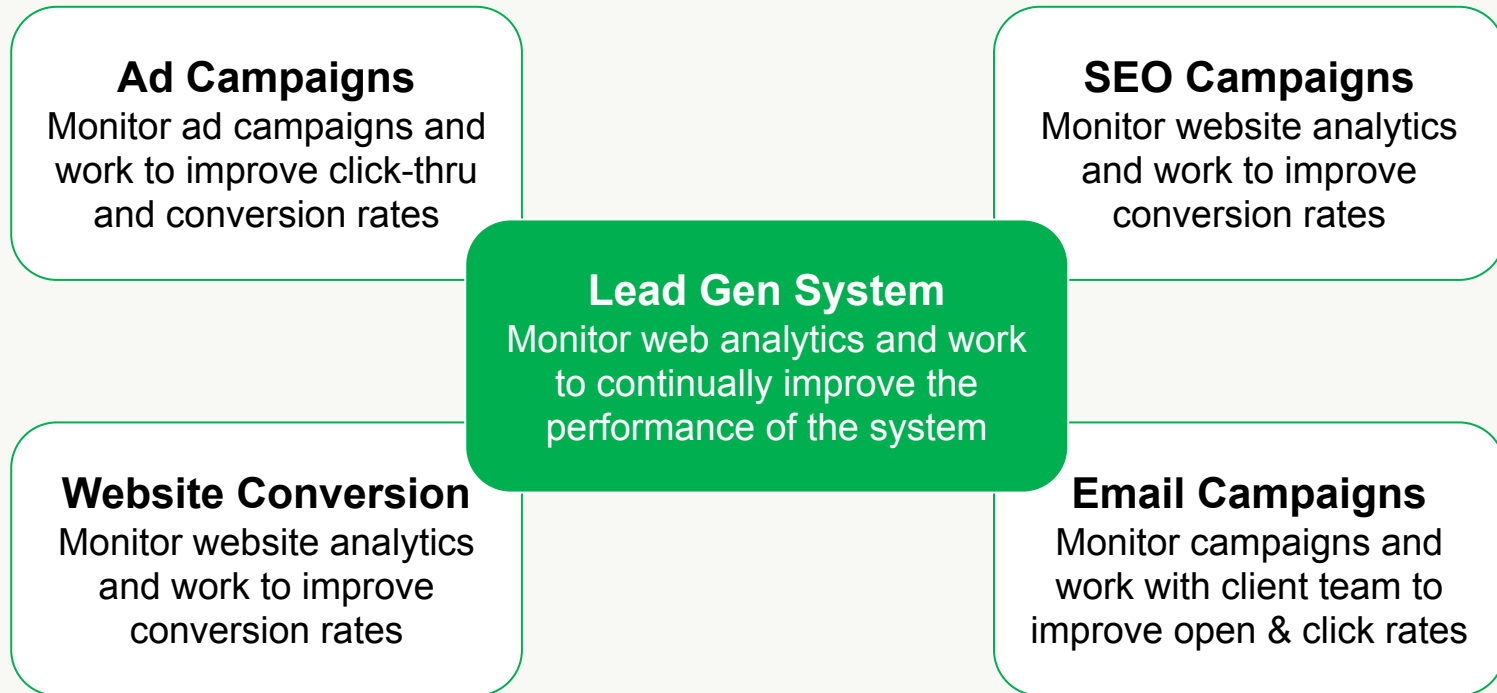
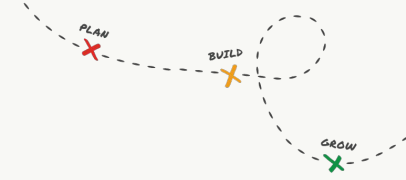
erpresearch.com

goodfirms.co

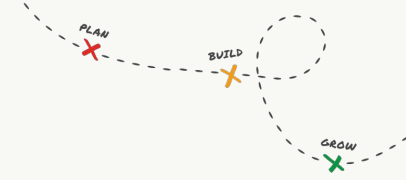


Goal is to build links from ranking websites to drive referrals & increase rankings

Continuous Improvement Plan



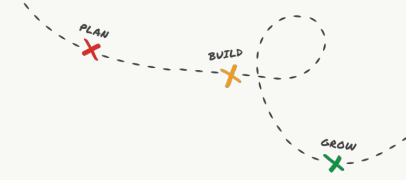
I&G and Client Roles



Area	I&G Team	Client Team
Content Development	<ul style="list-style-type: none"> • Develop brand messaging guide • Research & develop content briefs • Collaborate with client on content • Layout updated pages 	<ul style="list-style-type: none"> • Review & approve content ideas • Review & approve messaging & designs • Review & approve content briefs • Provide new content (copy, videos, etc.) • Review & approve content
Website Development	<ul style="list-style-type: none"> • Install and configure plugins • Develop/customize styles • Layout content • Build/integrate forms • Test prior to publishing • Troubleshoot issues 	<ul style="list-style-type: none"> • Provide access to systems • Review & approve web dev projects • Review/test updates • Report issues • Approve estimates (large ad hoc projects)
Technical SEO Work	<ul style="list-style-type: none"> • Install & configure plugins • Review & update settings • Review & optimize new content 	<ul style="list-style-type: none"> • Review and approve new ideas • Provide supplemental info or content • Review front end changes (when needed)
Ad Campaign Management	<ul style="list-style-type: none"> • Configure ad accounts • Develop retargeting audiences • Configure campaigns & ad sets • Develop ad creative and copy 	<ul style="list-style-type: none"> • Review & approve campaign plan • Review & approve ad creative • Review & approve ad copy
Expand Online Presence	<ul style="list-style-type: none"> • Develop profile & descriptions • Research & qualify opportunities • Conduct outreach & follow up 	<ul style="list-style-type: none"> • Review & approve profile & descriptions • Support verification processes • Provide content & info (as needed)
Link Building Campaigns	<ul style="list-style-type: none"> • Conduct research & qualify opportunities • Initiate outreach & establish contact • Arrange content & coordinate placements 	<ul style="list-style-type: none"> • Approve placements (as needed) • Support outreach (as needed)
Continuous Improvement	<ul style="list-style-type: none"> • Monitor website analytics • Provide monthly reports • Facilitate monthly strategy meetings • Develop growth action plans (as needed) 	<ul style="list-style-type: none"> • Review monthly reports • Participate in monthly strategy meetings • Review & approve growth action plans



Other Recommendations



3rd Party Reviews - ask loyal clients to review you on key platforms:

- Google (#1 priority)
- Facebook
- Clutch.co

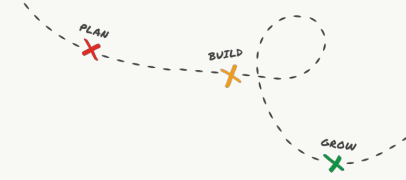
Develop video content for service division:

- Brand identity video
- Process video
- Software expertise videos
- Industry expertise videos
- Case study videos
- Blog explainer videos

Lead magnets to help provide a more compelling secondary call to action for prospects that aren't ready to book a call

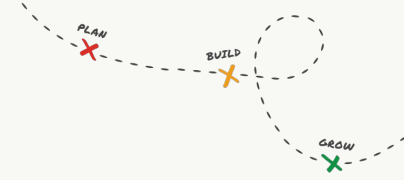
- Guide for [Industry Name] Accounting
- Guide for Succeeding with [Software Platform]
- Create email series for opt-ins & drive to sales call





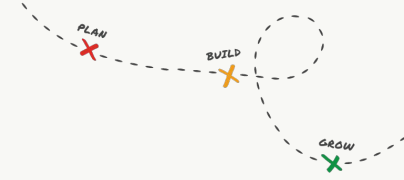
- Questions?
- Feedback?
- Next Steps?





Appendix



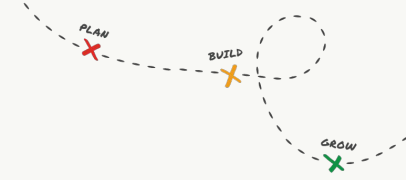


Website Analytics



Audience Overview

Google Analytics: 1/1/2022 - 12/31/22



● Sessions

10,000

5,000

March 2022

May 2022

July 2022

September 2022

November 2022

Users

51,910

New Users

51,943

Sessions

62,871

Number of Sessions per User

1.21

Pageviews

108,256

Pages / Session

1.72

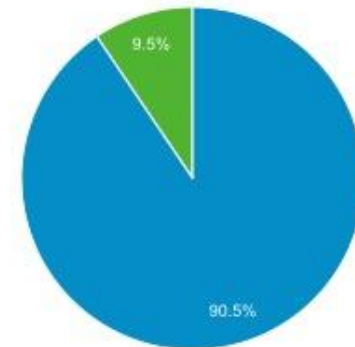
Avg. Session Duration

00:01:04

Bounce Rate

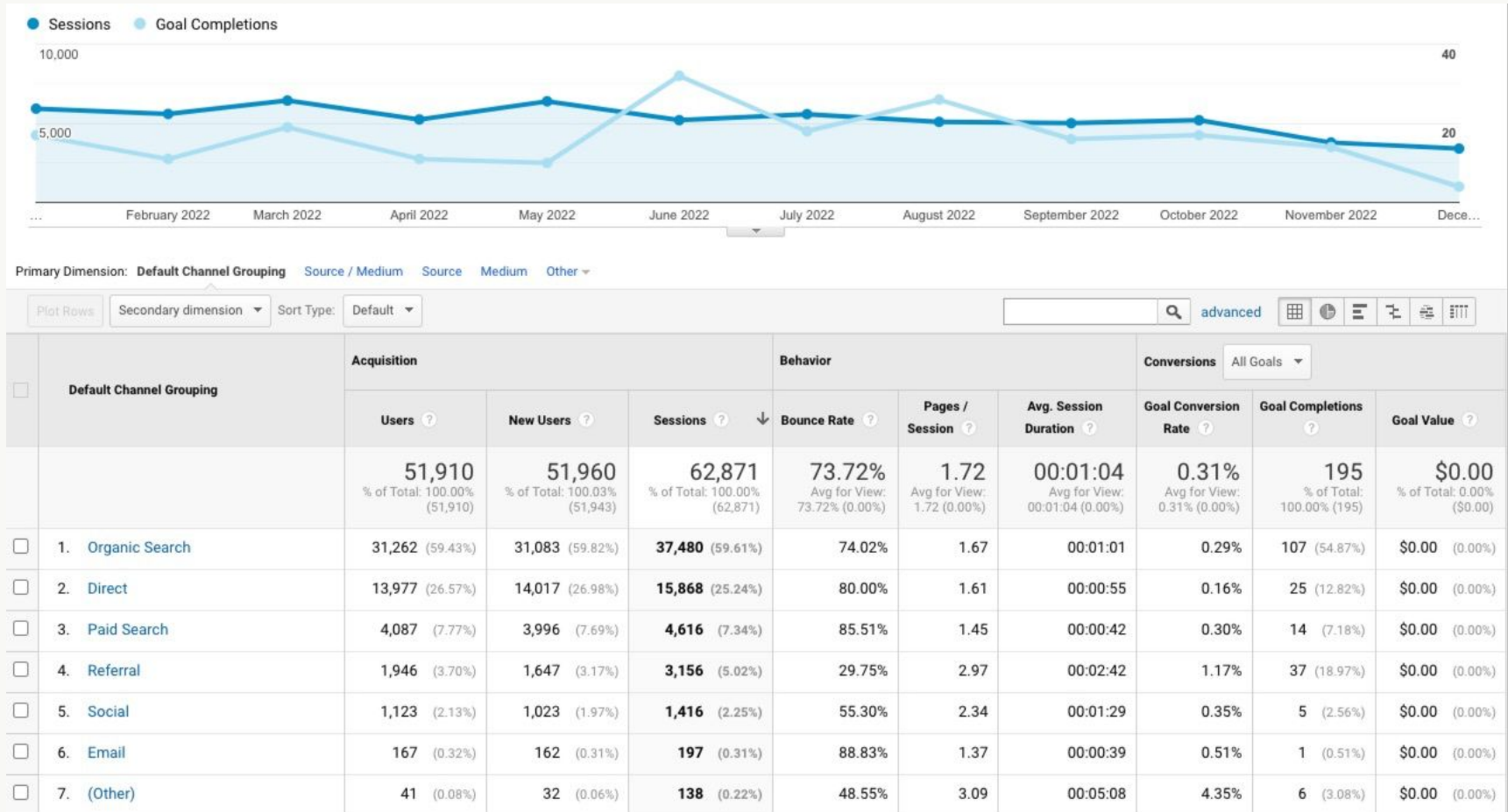
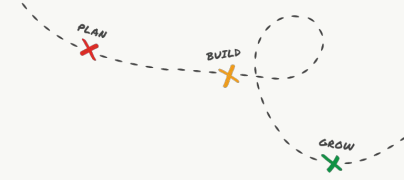
73.72%

■ New Visitor ■ Returning Visitor



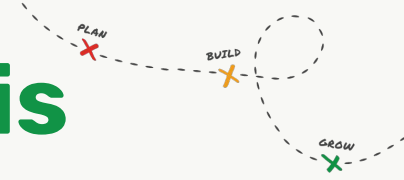
Analytics by Channel

Google Analytics: 1/1/2022 - 12/31/22



Assisted Conversions Analysis

Google Analytics: 1/1/2022 - 12/31/22

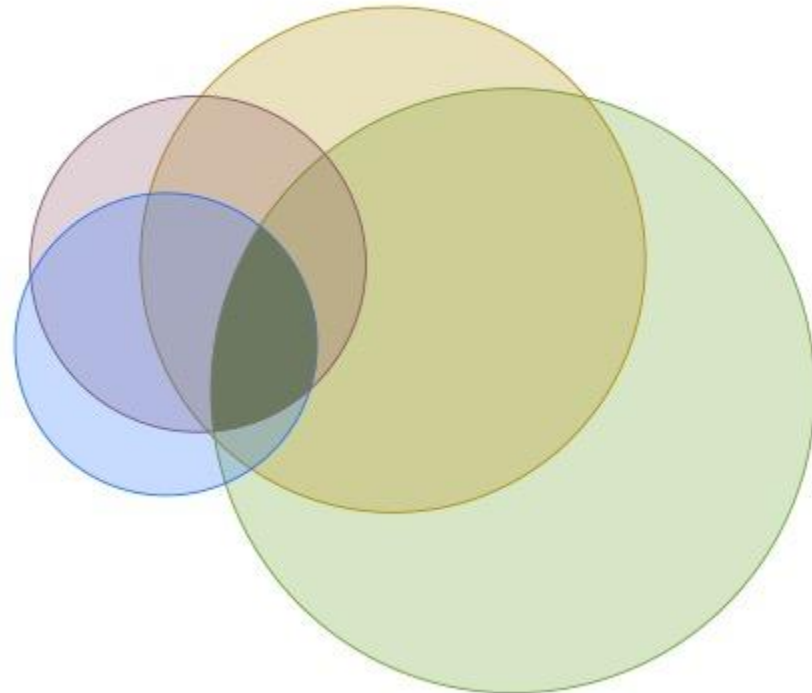


Multi-Channel Conversion Visualizer

See the percentage of conversion paths that included combinations of the channels below. Select up to four channels.

Channel	% of total conversions
<input checked="" type="checkbox"/> Organic Search	69.74%
<input checked="" type="checkbox"/> Direct	48.72%
<input checked="" type="checkbox"/> Referral	21.54%
<input checked="" type="checkbox"/> Paid Search	17.44%
<input type="checkbox"/> Social Network	7.18%
<input type="checkbox"/> Email	3.59%

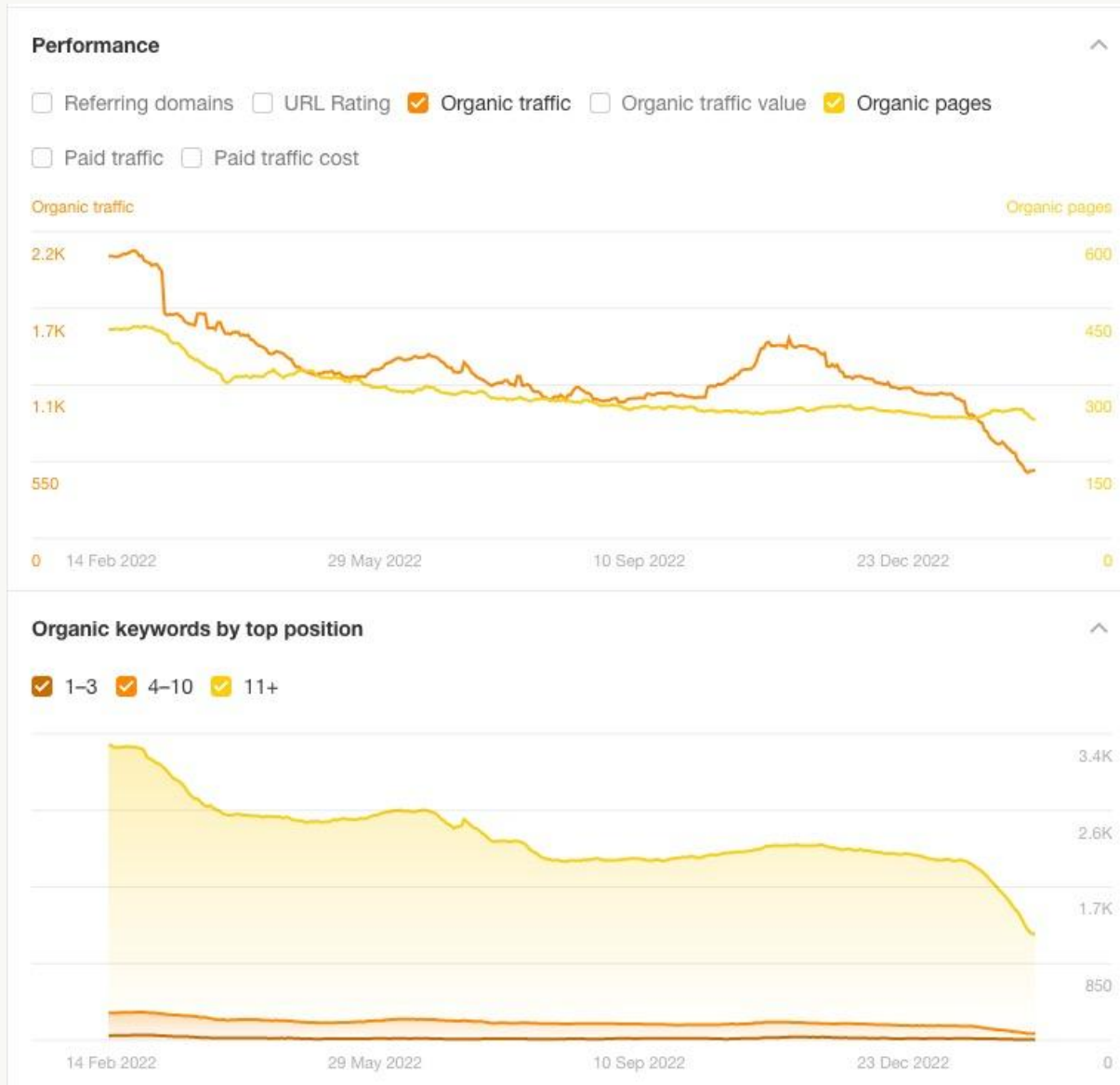
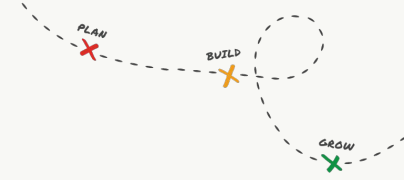
Organic Search & Direct & Referral & Paid Search: 9.23% (18)

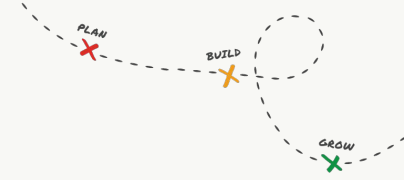


The overlap areas of the circles above are approximations.



SEO Performance

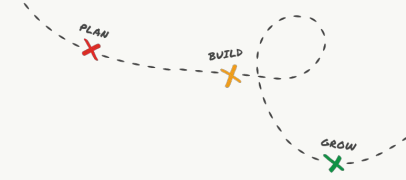




Website Audit



Website Audit

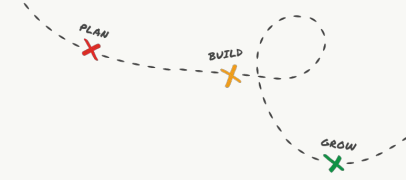


User Experience	Score
Professional Branding	✓
Attractive Visual Design	✓
Legible & Consistent Fonts	✓
Logical Navigation	✓
Mobile Friendly Layouts	✓
Secure Website	✓
Search Engine Optimization	Score
Internal Page Issues	✓
Indexability Issues	✓
Indexable Links	✓
Redirect Issues	✓
Content Tagging Issues	✗
Social Tags	✓
Duplicate Content	✗
Localization Issues	✓
Slow Pages	✗
Image Issues	△
Javascript Issues	✓
CSS Issues	△
External Page Link Issues	✓
Sitemap Issues	✓

Content Inventory	Score
Header & Footer	△
Homepage	✓
About Pages	△
Service Pages	△
Supporting Content	✗
Form Pages	△
Resources	✗
Conversion Optimization	Score
Obvious Primary Call-to-Action	△
Easy to Find Phone Number	✗
Testimonials/Reviews	✓
Relevant Trust Symbols	✓
Secondary Calls-to-Action	△



Website Content Inventory

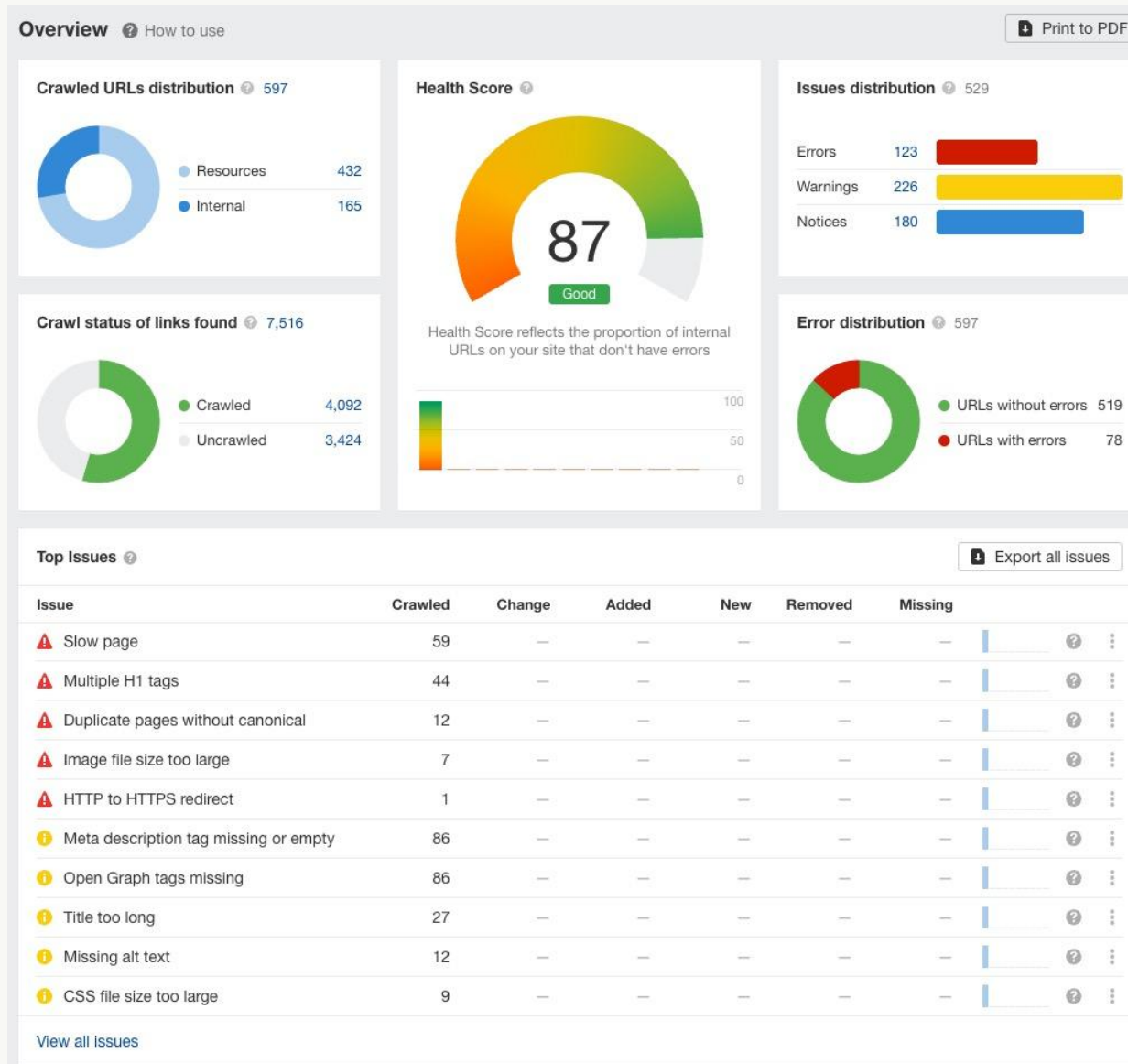
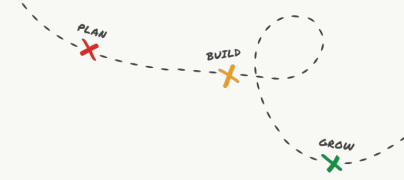


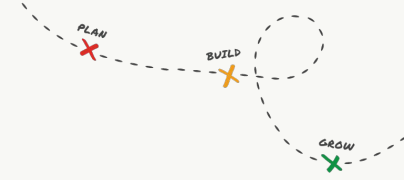
Header & Footer	Score
Brand Logo	✓
Primary Navigation	✓
Primary CTA Button	Δ
Phone Number	✗
Location Info	✗
Social Links	✓
Trust Symbols	✓
Homepage	Score
Compelling Headline & Subheadline	✓
Primary & Secondary Calls-to-Action	✓
Key Benefits & Features	✓
Social Proofs	✓
Links to Main Services	✓
Company Info	✓
About Page(s)	Score
Clear Mission Statement	✓
Company Story	Δ
Explain Who You Serve	✓
Core Values	✓
Press & Awards	✗
Team Picture & Bios	✓

Service Pages	Score
Page for each Main Service	✓
Compelling Headlines	Δ
Informative Section Headings	✓
Useful Supporting Copy	Δ
Persuasive Calls-to-action	Δ
Integration of Social Proofs	✓
Consistent Formatting	✓
Adequate Use of Images & Video	✗
Supporting Content	Score
Pricing Information	✗
Process	✓
Case Studies/Testimonials	Δ
Frequently Asked Questions	✗
Service Area & Location Pages	✗
Form Pages	Score
Use of Online Form(s)	✓
Easy to Read & Use Form Inputs	Δ
Explanation of Post-Form Actions	Δ
Form Confirmation	✓
Resources	Score
Informative Blog Articles	✓
Helpful Videos	✗
Interactive Tools	✗
Downloadable Guides	✗



Technical SEO Audit

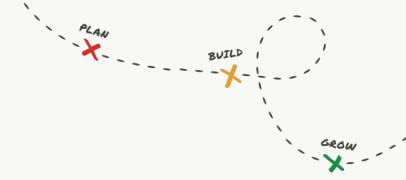




Google Ads Audit



Quick Facts



ACTIVE SEARCH CAMPAIGNS

4

AVG ACTIVE AD GROUPS PER CAMPAIGN

1.8

ACTIVE AD GROUPS

7

AVG ACTIVE KEYWORDS PER AD GROUP

7.3

ACTIVE KEYWORDS

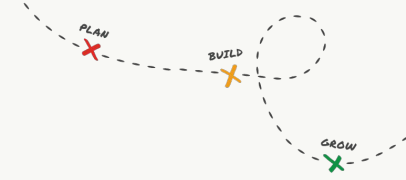
51

ACTIVE ADS

7

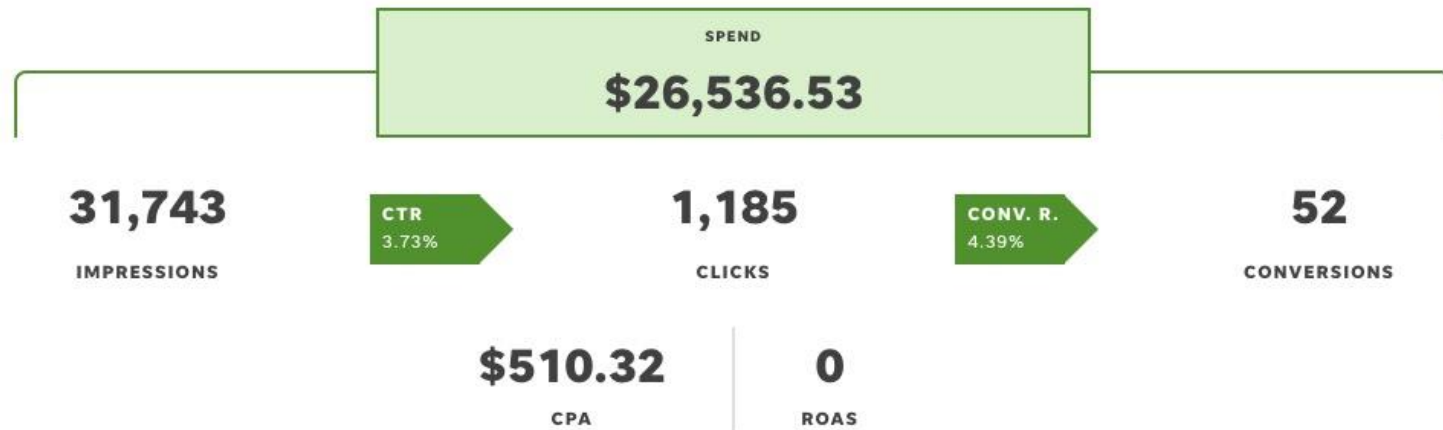


Performance Snapshot

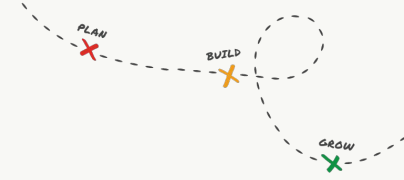


Search

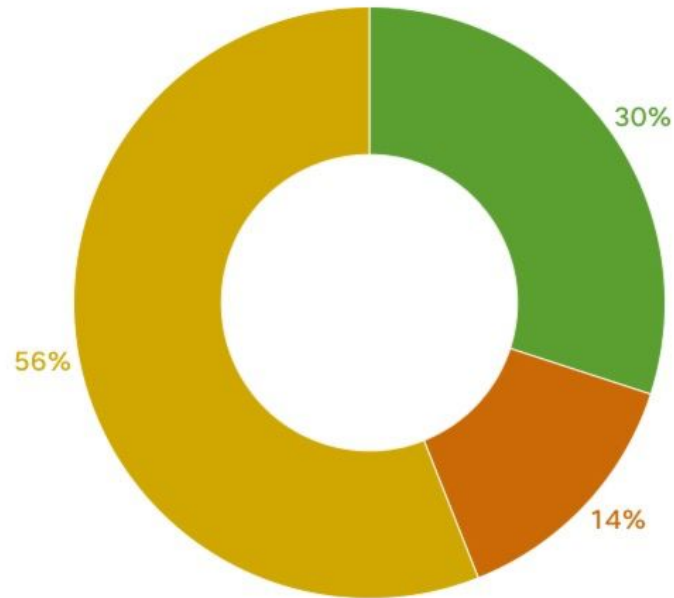
The metrics below were generated from Search campaigns in your account for the last 90 days.



Search Impression Share



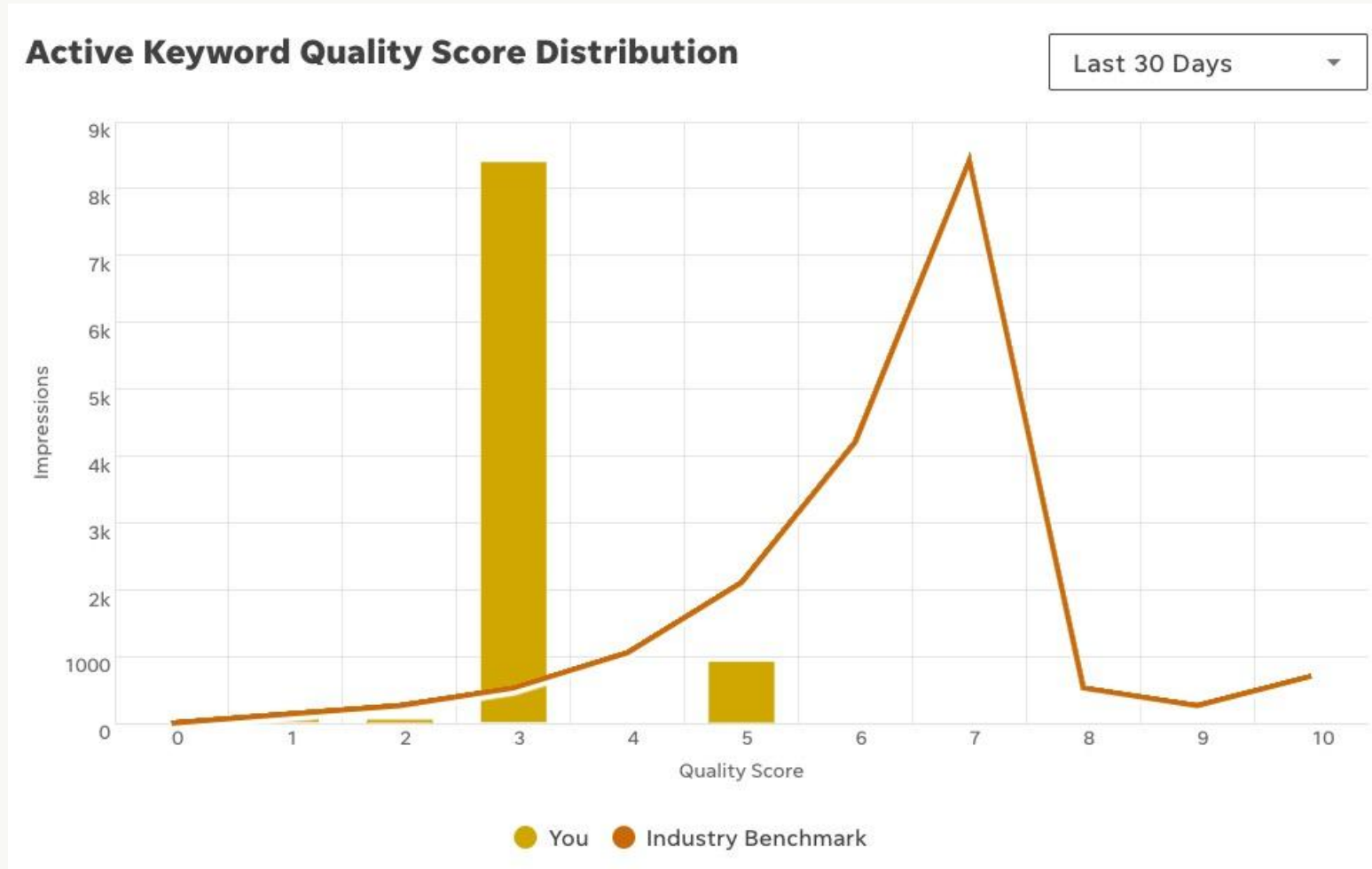
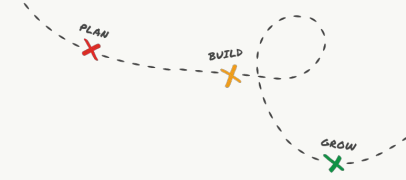
Budget Weighted Impression Share



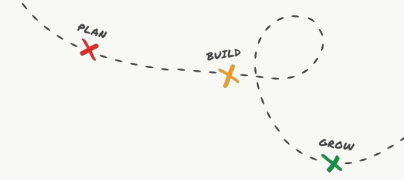
● Share Acquired ● Share Lost To Budget ● Share Lost To Ad Rank



Keyword Quality Scores



Glossary of Terms



- **CTR:** Click-through rate, or the amount of users who click through to another page on your site
- **Conversions:** The number of users who completed a specified action on your website
- **CRO:** Conversion Rate Optimization, or work done to improve your conversions
- **Direct Traffic:** The number of users who get to your website by typing your URL in the address bar
- **NAP:** Name, Address, Phone number info used in directories
- **Organic Traffic:** The number of users who get to your site by clicking a non-paid search result
- **PPC:** Pay-Per-Click, or paid ads on search and social profiles
- **Referral Traffic:** The number of users who get to your page by following a link from another site
- **SEO:** Search Engine Optimization, or work done to improve the chance of your site ranking highly in search engines
- **SERP:** Search Engine Results Page
- **Sessions:** The activity a single user engages in while visiting your website during a given time frame
- **UX:** Used to describe user experience and work to improve it on the website

