Directive

Full Service Strategy
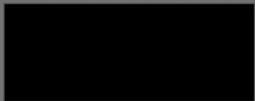
Overview

Executive Overview
& Key Findings

Directive

What we learned

PAID MEDIA FINDINGS

- Keywords are not aligned with product pillars or user intent. Our new keywords/structure will help capture higher value users.

- Overall, low performance and ROI across search and LinkedIn due to missing conversion events and conversions not optimized for pipeline

- Low share of SERP across non-branded keywords means opportunity for higher visibility when users are in-market

SEO FINDINGS

- The competition is ahead in organic traffic that comes from high-intent and transactional keywords.

- Core pages are not optimized for organic search and are therefore not discoverable by our audience on Google.

- Site architecture can be enhanced to better align with Finance Leaders to ensure ICPs see themselves (and their solution) when they use our website.

DESIGN FINDINGS

- There is very little visual/story differentiation in the marketplace when our ICP compares options from website to website.

- Incorporating a 'less is more' strategy on the homepage, along with more 'See Demo' CTAs across the site could increase user engagement and lead to more conversions.

- We are lacking immersive and dynamic UI animations, in addition to a strong product explainer overview video to engage your ICP with your differentiating value proposition.

Directive,

Where (Client) Fits in the Market

(Client) is the most complete mid-market platform for financial professionals and leaders. It's an easy to use solution that increases precision, adaptability, and performance by providing an all-in-one experience for accurate and secure financial performance management.

Directive,

Where Each Product Stands

Financial Planning & Analysis

Data-driven forecasting together with actionable, real-time analytics for improved planning accuracy, agility and business performance.

Financial Consolidation

Accelerate and streamline your financial consolidation regardless of the currency, GAAP rules, consolidation scenario or group structure with a feature-rich, audit-ready financial consolidation application.

Intercompany Management

Automated data collection, validation and transaction matching for a fully transparent & faster intercompany reconciliation process.

Account Reconciliation

Automated transaction matching with collaborative workflows and real-time close performance reporting for an accurate, efficient close process.

Directive

Speak to Your Target Audience

The Financial Architect

Risks and Fears
- Data inaccuracy
- Finding the right tools to maximize team efficiency
- Meeting profitability and revenue targets

JTBD
- Transformation
- Leads financial strategy
- Reports to stakeholders

The Reporting Virtuoso

Risks and Fears
- Data inaccuracy leading to incorrect reporting and forecasting
- Security and compliance
- Limited scalability with current tools

JTBD
- Automates data collection
- Ensures compliance
- Supports financial strategy

The Data Dynamo

Risks and Fears
- Data inaccuracy leading to incorrect reporting and forecasting
- Delays due to manual processes
- Regulatory failures

JTBD
- Day-to-day acct/fin operations
- Data consolidation
- Financial close process

Product X Role Alignment

Financial Planning & Analysis	Financial Consolidation	Intercompany Management	Account Reconciliation
CFO	Group CFO	Group CFO	Accounting Team
VP of Finance	Controller	Controller	Controllers
Executive VP of Finance	Group Financial Director	Group Financial Director	Accountants
Director of Finance	Head of Consolidation	Head of Consolidation	Reconciliation Analysts
Director, FP&A Finance	Group Finance Reporting & Consolidation	Group Finance Reporting & Consolidation	Internal/External Auditors
End Users / Contributors	Consolidation Manager	Consolidation Manager	Chief Accounting Officer
Financial Analyst	Consolidation Accountant	Consolidation Accountant	Compliance Officers
Budget Analyst	Financial Analyst	Financial Analyst	Finance Team
			CFO
			Senior management: VP, Director Manager of Finance

Customer Generation
Strategy

Directive

The Strategy to Succeed

(Client) is the leading mid-market financial software worldwide. It is known for precision, adaptability, and performance. (Client) stands out as the all-in-one solution for Finance and Accounting teams.

To ensure (Client) wins in competitive moments and cuts through the noise, we'll use a multi-faceted Customer Generation strategy that drives more customers, like our best existing ones.

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Strategy Overview

Our Customer Generation strategy is centred around driving SQLs, a strong indicator for what deals build pipeline for your business.

We'll hone in on three key elements to drive success across paid, SEO and CRO.

Efficiency

User Journey

Market Share

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H2 Goal is 479 SQLs
- Q3 336 SQLs (318 from paid)
- Q4 144 SQLs (124 from paid)

QoQ this is a **3,633% increase** when looking at 2023 and 2024 SQL historicals

The (Client) CP-SQL is currently $11,000 CAD
Industry average is around $10,000 USD

Q3 2024

Goal Setting		Goal Type: Stage 2 - SQLs ▾
Stage 2 - SQLs Goal	318.00	106 per month from paid
Quarterly Budget	$300,000	$100k per month
Cost-per-Stage 2 - SQL Needed	$943	

Q4 2024

Goal Setting		Goal Type: Stage 2 - SQLs ▾
Stage 2 - SQLs Goal	124.00	106 per month from paid
Quarterly Budget	$300,000	$100k per month
Cost-per-Stage 2 - SQL Needed	$2,419	

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Paid Media LTV:CAC

What we strive for:

H2 Goal:

92 SQLs

Our ideal goal is 4x the current performance to meet a 3:1 LTV:CAC ratio.

Goal Setting

Goal Type: LTV:CAC

LTV:CAC Goal	3.00
Quarterly Budget	$413,494
Cost-per-Customer Needed	$97,113

Reality Check

1. Start off with entering the Target CTR and CVR.
Ex. I expect my ads will have a X% CTR and my LP to have a X% CVR.

Ad Click-through Rate:	4.51%	*What is your target CTR?*
Landing Page Conv. Rate:	3.66%	*What is your target LP CVR?*

2. Compare the Impr. and Clicks needed with the platform estimates.
Ex. I need 100k impr, but LinkedIn is forecasting only 50K with my audience size.
Ex. I need 30k clicks, but Google Ads is forecasting only 10K with my search volume.

Impressions Needed:	115,105	*is my TAM large enough for this?*
Clicks Needed:	5,191	*is my audience/keyword volume big enough?*
Cost per Click Needed:	$79.65	*is this realistic based on my channel mix?*

Projections

	Goal	Cost-per
Leads	190	$2,176
MQLs	116	$3,565
Stage 2 - SQLs	36	$11,486
Customers	4	$103,374

LTV:CAC Ratio	2.82
Est. Revenue	$1,165,352
Net Return	$751,858

Conversion Rates

Lead > MQL	61%
MQL > Stage 2 - SQL	31.0%
Stage 2 - SQL > Customer	11.1%

Highlighted rate based on industry benchmark.

As SEO brings qualified traffic and leads to the site, closed won starts to gain momentum and grow revenue through organic channels
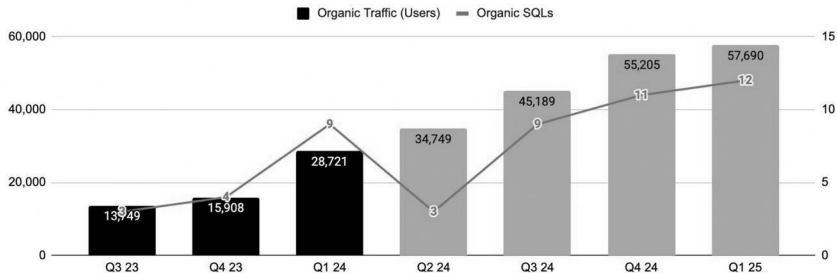
Connecting SEO to revenue, we can see the economic impact of growing qualified leads through the organic channel.
Expanding into EMEA would support further SQL growth

H2 Goal

25 SQLs

+257% vs. PY

12 Month NSM Projection

■ Organic Traffic (Users) — Organic SQLs

	Q3 23	Q4 23	Q1 24	Q2 24	Q3 24	Q4 24	Q1 25
Customers	1.00	1.00	1.00	1.00	2.00	3.00	3.00
Total Est. Revenue	$291,338	$291,338	$291,338	$291,338	$582,676	$874,014	$874,014
LTV:CAC Ratio	13	13	13	13	26	39	39

SEO Annual NSM Worksheet

Paid Media
Strategy

Directive‚

Paid Media Strategy

4 KEY INITIATIVES

01

Google account restructure

By focusing on high-intent keywords to convert users who are ready to buy, we'll lower CP SQL and reinvest that budget to grow volume.

02

A/B test landing pages

The critical post-click experience will be a testbed for CRO; we want to make the most of every dollar spent to drive high-intent users to the site.

03

Convo ads on Linkedin

We've seen consistent success across industries and business models using incentivized conversational ads on LinkedIn. We'll pair this ad format with TAM lists built from our customer analysis.

04

New high-qualified categories to G2

We've found the best categories for (Client) to compete in, now it's time to make improve discoverability and make (Client) undeniable in the buying journey

Directive

Paid Media Strategy
Recommended channels and tactics
to achieve our NSM

CHALLENGE

Competitors are winning in key SERPs

Competitors (Competitor), (Competitor), and others are dominating the SERPs with a combination of Paid and Organic listings that force a prospect to reckon with them as a possible solution.

We need to disrupt the current dynamic by showing up at the right time for the right people with the right offer.

Source: Google

Directive

Paid Media Strategy
Recommended channels and tactics
to achieve our NSM

18

Organic search results feature paid opportunities in disguise

Our share of SERP analysis revealed the blend of directories and listicles for your top terms.

While many listicles are directly on competitor sites, some results are **pay-to-play** directories or third-party listicles where we can improve positioning through outreach and dollars.

Source: Share of SERP Audit for FP&A and CPM

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Google Ads

Microsoft Advertising

Paid Search

Channel Tactics

- **Segment Keywords for Optimized Relevancy**

- **Offline Conversion Tracking**

- **A/B Test Landing Pages**

- **Search Targeting to Remarketing Audiences**

- **Transition Learnings to Microsoft Ads**

Directive,

Segment Keywords for Relevancy

The SERP is highly competitive and we need to make sure (Client) can keep up with it.

By splitting keywords into more targeted ad groups for custom copy and landing pages, we can give priority to BOFU keywords with qualifiers like 'software', 'tools', 'platform', and 'solutions'. We'll align these to the best user journey for each.

Additional campaigns are broken out by pillar to clearly identify which types of keywords are performing, while allowing more budget control.

Outcome: Increased efficiency in paid search, higher relevancy will reduce CPC and maximize budget for lower overall CPA.
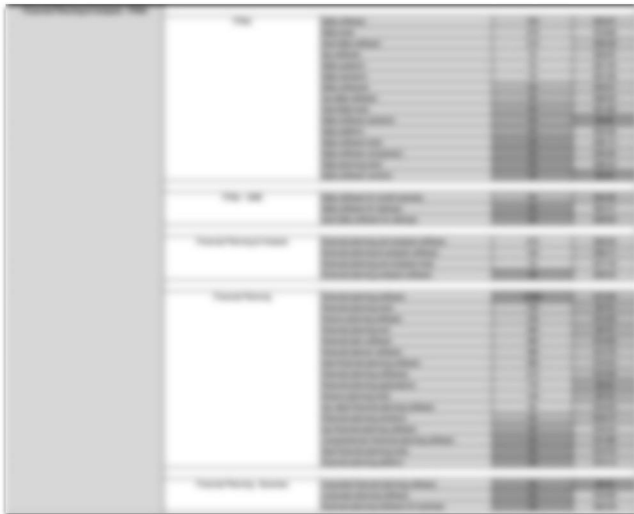
Source: BOFU Keywords

Directive,

Paid Media Strategy
Recommended channels and tactics
to achieve our NSM

**Multiple Primary
conversions but no OCT to
pipeline events**

Google Ads is optimizing to
multiple events that don't always
lead to pipeline conversions. Form
fills, calls from ads, and app
installs are prioritized equally.

Conversion events don't align
across channels, as LinkedIn is
missing key conversions and
includes outdated events.

Google Ads

LinkedIn Ads

Directive

A/B Test New Landing Page + Sitelink Combinations

Many current ads and ad extensions leverage the demo request page by default. Not all traffic is ready for this step, though.

By A/B testing non-demo landing pages as the main ad link, we can leverage the 'See a Demo Now' extension, which has the highest number of engagements and conversions, to capture users who are ready to engage.

We'll also test ad extension copy to find what performs best.
Outcome: Better user journey, leading to improved lead opportunities. Additionally, reducing potential spam and less qualified demo bookings.

Source: Google Ads

Directive

Increase Search Targeting to Recent Visitors

Procuring software this important is a time consuming process for most organizations, meaning that someone that has visited your website recently is likely not done with their software buying journey and is worth getting back in front of them.

Increasing bids to recent visitors within the last 90 days will keep you top of mind when placed against top competitors.

Outcome: Higher search impression share and more conversions from qualified visitors.

Audience segment	Cost	Search impr. share	Search lost IS (rank)	Search exact match IS	Conv. rate ↓	Conversions	Cost / conv.
All of my site visitors · GA4	$161.15	44.27%	17.18%	61.73%	20.00%	4.00	$40.29
All visitors (AdWords)	$478.16	47.74%	18.54%	73.01%	8.33%	4.00	$119.54
All visitors across www.prophix.com · Thank you	$770.15	44.08%	19.03%	64.37%	6.58%	5.00	$154.03
Business Services Business Technology	$358.95	59.35%	16.13%	68.29%	6.38%	3.00	$119.65
Technology	$1,750.83	54.07%	14.34%	64.43%	5.80%	13.00	$134.68

Source: Google Ads

Directive

Transition Optimized Campaigns to Microsoft Ads

Microsoft Ads campaigns are currently paused, however audiences are likely to have similar search habits as Googlers at a lower cost due to less competition on MS Ads.

The majority of visitors are on Windows and more likely to use Bing to search. Once Google Search campaigns have been updated and optimized, synching over top performing campaigns should be tested.

Outcome: Additional conversions at lower CPCs, CPAs, and volume.

↑ Campaign	Delivery ⓘ	Campaign type
Asset Download - CA_EN	⚠ Campaign paused	Search
Asset Download - US_EN	⚠ Campaign paused	Search
Better Business Planning	⚠ Campaign paused	Smart
BOFU - Demo - CA_EN	⚠ Campaign paused	Search
BOFU - Demo - US_EN	⚠ Campaign paused	Search
Brand - US_EN	⚠ Campaign paused	Search
Brand- CA_EN	⚠ Campaign paused	Search
Competition-EN-World		
Retargeting Display CAN		

Users▾ by Operating system		⊘ ▾
OPERATING SYSTEM		USERS
Windows		129K
Android		43K
Macintosh		37K
iOS		24K
Linux		4.7K
Chrome OS		1.7K
Win32		109

Directive

Linked in ®

Paid Social

Channel Tactics

- **Customer-led Audience Lists from TAM**

- **Convo Ads & Gift Card Incentive**

Paid Media Strategy
Recommended channels and tactics to achieve our NSM

Customer-Led TAM for Efficiency & Scale

Primary Sub-Industry	Company Count	% of Total	Total Value (CAD)	% of Total	Avg. Value (CAD)
Industrial Machinery & Equipment	65	4%	$4,090,086	4%	$62,924
Building Materials	52	3%	$3,254,229	3%	$62,581
Automotive Parts	15	1%	$1,411,987	1%	$94,132
Medical Devices & Equipment	19	1%	$1,282,722	1%	$67,512
Test & Measurement Equipment	11	1%	$699,036	1%	$63,549
Commercial & Residential Construction	89	5%	$7,073,352	6%	$79,476
Architecture, Engineering & Design	37	2%	$2,971,445	3%	$80,309
Civil Engineering Construction	28	2%	$1,983,468	2%	$70,838
Home Improvement & Hardware Retail	15	1%	$1,104,073	1%	$73,605
Automobile Parts Stores	10	1%	$837,739	1%	$83,774
Non-Profit & Charitable Organizations	61	3%	$4,377,024	4%	$71,754
Membership Organizations	33	2%	$2,395,303	2%	$72,585
Colleges & Universities	54	3%	$4,228,925	4%	$78,313
Training	10	1%	$703,775	1%	$70,378
Investment Banking	26	1%	$2,281,968	2%	$87,768
Electricity, Oil & Gas	39	2%	$3,148,731	3%	$80,737

Outcome: We drive meetings directly from the platform with efficiency; each meeting will be with a company we know is a good fit.

Who is your target audience?

Include people who have ANY of the following attributes:

Company Industries

Industrial Machinery Manufacturing, Motor Vehicle Parts Manufacturing, Medical Equipment Manufacturing, Measuring and Control Instrument Manufacturing, Agriculture, Construction, Mining Machinery Manufacturing, Construction Hardware Manufacturing, Nonresidential Building Construction, Residential Building Construction, Building Construction, Highway, Street, and Bridge Construction, Non-profit Organizations, Professional Organizations, Investment Banking, Oil and Gas, Electric Power Transmission, Control, and Distribution, Freight and Package Transportation, Transportation, Logistics, Supply Chain and Storage, Services for the Elderly and Disabled, Medical Practices

AND also have ANY of the following attributes:

Company Size

201-500 employees, 501-1000 employees, 1001-5000 employees

AND also have ANY of the following attributes:

Company Revenue

$10M-$100M, $100M-$1B

AND also have ANY of the following attributes:

Job Titles (Current)

Chief Financial Officer, Financial Officer, Executive Vice President of Finance, Vice President Finance, Vice President Financial Planning, Vice President Corporate Finance, Head of Accounting, Operations Controller, Director Investment Banking, Regional Chief Financial Officer, Division Chief Financial Officer, Acting Chief Financial Officer, Chief Operating Financial Officer, Chief Financial Officer Operations, Deputy Chief Financial Officer, Interim Chief Financial Officer, Group Chief Financial Officer, Director of Financial Services, Director of Financial Planning, Director of Financial Planning and Analysis, Director of Financial Reporting, Director of Financial Analysis, Assistant Director of Finance, Group Finance Director, Head of Finance, Director of Finance And Operations, Group Financial Controller, Director Corporate Finance, Managing Director Finance, Head of Financial Planning, Head of Financial Control, Head of Financial Planning Analysis, Head of Financial Accounting, Head of Financial Services, Financial Controller, Senior Financial Planning Analyst, Director of Finance And Administration, Controller, Assistant Controller, Business Controller, Senior Business Controller, Group Financial Controller, Director Corporate Finance, Senior Financial Controller, Senior Controller, Financial Planning Manager, Financial Planning and Analysis Manager, Manager Financial Analysis, Financial Control Manager, Business Finance Manager, Senior Manager Financial Planning Analysis, Senior Financial Analyst, Director of Accounting, Director of Finance And Accounting, Finance Accounting Manager, Chief Accounting Officer, Accounting Manager, Director of Corporate Accounting, Director of Accounting Services, Director of Accounting Operations, Senior Director of Accounting, Vice President Financial Reporting, Vice President Finance Accounting, Vice President of Financial Planning Analysis, Senior Accounting Manager, Vice President of Accounting, Senior Manager Finance Accounting, Senior Manager Financial Services, Senior Financial Planner, Senior Financial Reporting Analyst

Narrow   audien...

Exclude people wi...

Company (Curre...

Dataralis, OneStre...   ...tanful Finance.

Forecasted results
Target audience size
120,000+
Segment breakdown
Function ▾

Finance	61%
Accounting	41%
Business Development	14%
Operations	14%
Education	5%
Hide segments

ℹ Forecasting is not yet available for your current campaign setup.

Forecasted results
Target audience size
11,000+
Segment breakdown
Function ▾

Accounting	46%
Finance	46%
Operations	17%
Business Development	12%
Quality Assurance	6%
Hide segments

ℹ Forecasting is not yet available for your current campaign setup.

NA + UK   BE, LUX + FR

Directive

Use conversation ads for tailored messaging to individual customer personas

Highlights the unique value (Client) provides, utilizing social proof and customized ad copy to the targeted customer persona, appealing to their specific pain points (based on job title, company size, industry, and more) while following up with an irresistible offer.
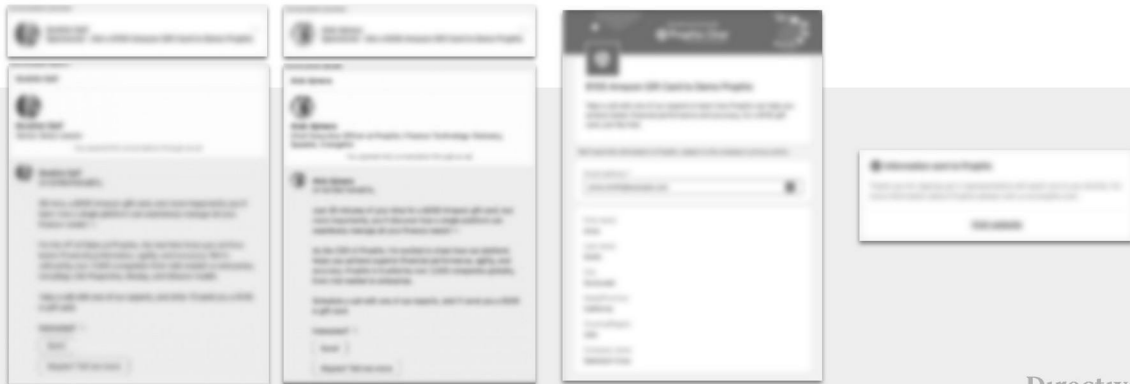
Source: Conversation Ad Flow

Directive,

Drive opportunities for sales conversions with incentivized offers

We will be listing in the message how long (29 minutes), what they will get (gift card) and what they will learn from taking the meeting with (Client).

Utilizing the gift card offer entices our ICP to take the time to meet with your representatives because it will be worth it.

We will be using the $105 gift card offer targeted to our ICP of Reporting Virtuoso's and $250 offer to Financial Architects.

We are highlighting the effects of user observability by creating FOMO - by mentioning how other orgs are winning with (Client).

Directive,

Gift Card Offer

A key initiative for this tactic to work is the use of an incentive. We are asking prospects to give us time out of their day for something they are not actively looking for. If we know they are a good fit, we **need** to offer them value for their time to drive efficient volume.

This benchmark data shows how performance changes along with the incentive.

Gift Card Amount	CPL	Conv. Rate	Impr. to Lead	ROI
$0	$552	0.52%	0.22%	$0
$50	$330	0.98%	0.35%	$0
$100	$177	1.77%	1.04%	$2.9M
$105	$253	2.70%	1.27%	$3.4M
$110	$300	2.22%	1.00%	$275K
$250	$423	3.11%	1.36%	$431K
$500	$584	8.93%	2.80%	$389K

Directive,

Optimize Funnel Metrics with Chili Piper

Chili Piper is advanced scheduling software for B2B revenue teams.

Directive was able to improve funnel conversion metrics by adding Chili Piper to our martech stack and it's done the same for dozens of our clients.

Without Chili Piper

34%

Form Fills > Intros
Held Conversion Rate

With Chili Piper

51%

Form Fills > Intros
Held Conversion Rate
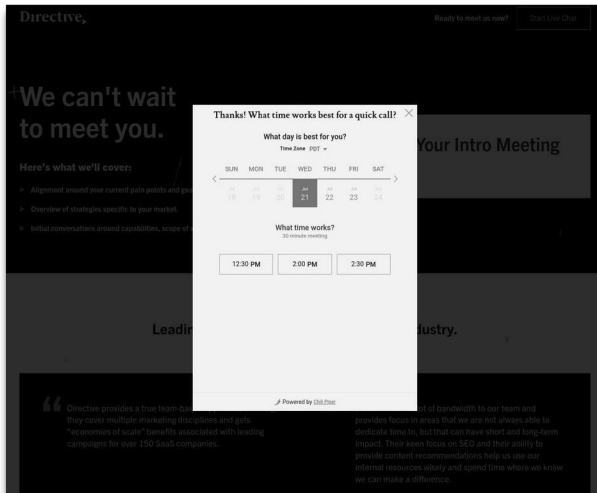
Directive,

Rediscovering
Directories

Back claims with trusted reviews and promoted listings.

Channel Tactics

1. **Promote Current Listings in New Categories**

2. **Pay per Lead Initiative**

G2

Capterra

TrustRadius

Software Advice.

Directive

Promote Current Listings in New Categories

Financial Analysis makes up the other half of FP&A, but (Client) isn't listed here even though other key competitors like Vena are.

Additionally, the smaller but very relevant category 'Financial Reconciliation' does not include (Client). Adding these new categories would be beneficial at generating more awareness of key product functions.

Outcome: More categories means more visibility to potential customers and more consideration from a buyer when narrowing down their options.

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Leverage Gartner's PPL Specialty

Software Advice's Pay Per Lead offering narrows inquiring companies down only to those who **fit our criteria** and ensures that we only pay when it's worth our budget to do so.

- Company size
- Industry
- Need
- Region

Outcome: SQL-quality leads brought to us; relatively low volume but high efficiency.

Software Advice.

Other
Accounting Software
Business Intelligence Tools

File Sync Software
Financial Close Software
Financial Fraud Detection Software
Financial Risk Management Software
Financial Services Software
Firewall Software

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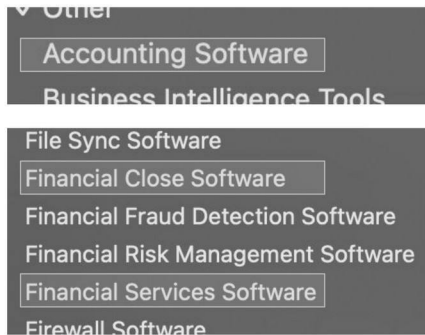
Budget Plan

Initial: $50k per month to start with a focus on demand capture through paid search.

- Our revamped Google Ads campaign is going to tell us exactly where we aren't competitive enough, from a budget or quality perspective.

Next Step Up: Moving to $100K per month for September to help increase awareness and drive incremental conversions through BOFU tactics on LinkedIn.

- Future state opportunities are included should there be incremental spend available.

Channel	Objective	Audience List	Geo	Budget	July	August	September	Q3 Total	October	November	December	Q4 Total	H2 Total
					1 8 15 22 29	5 12 19 26	2 9 16 23 30	Q3	7 14 21 28	4 11 18 25	2 9 16 23 30	Q4	
Paid Search	Conversion	NAMER	Brand	$94,000	$9,000	$9,000	$19,000	$37,000	$19,000	$19,000	$19,000	$57,000	$94,000
			Non-Brand	$188,000	$18,000	$18,000	$38,000	$74,000	$38,000	$38,000	$38,000	$114,000	$188,000
			Competitor	$33,000	$4,500	$4,500	$6,000	$15,000	$6,000	$6,000	$6,000	$18,000	$33,000
		EMEA	Brand	$10,000	$1,000	$1,000	$2,000	$4,000	$2,000	$2,000	$2,000	$6,000	$10,000
			Non-Brand	$20,000	$2,000	$2,000	$4,000	$8,000	$4,000	$4,000	$4,000	$12,000	$20,000
			Competitor	$5,000	$500	$500	$1,000	$2,000	$1,000	$1,000	$1,000	$3,000	$5,000
LinkedIn	Awarness, Consideration, Conversion	NAMER	Sponsored content lead gen forms	$150,000	$15,000	$15,000	$30,000	$60,000	$30,000	$30,000	$30,000	$90,000	$150,000
		EMEA		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
			Total	$500,000	$50,000	$50,000	$100,000	$200,000	$100,000	$100,000	$100,000	$300,000	$500,000

Link to full media plan

Key Campaigns	July	August	September		October	November	December
Evergreen				Products			
Campaigns		Cash Flow	Budgeting and Planning			Year End Close	

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International EMEA Strategy

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EMEA paid search will be divided into three segments based on opportunity, targets, and resources

Segments 1 & 2	
89% share of budget for UK - English & EMEA - English	

21%		68%	

Country	Language
UK	English

Country	Language
Belgium	
Luxemburg	
France	
Netherland	
Germany	English
Austria	
Switzerland	
Italy	
UAE	
Ireland	

Segment 3	
11% share of budget for EMEA - Native Language	

3%		6%	

Country	Language
Belgium	
France	French
Switzerland	
Luxembourg	

Country	Language
Luxembourg	
Germany	German
Austria	
Switzerland	

Country	Language
Belgium	Dutch
Netherland	

Country	Language
Italy	Italian

2%	1%

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Paid Social targeting

50-500 employees

Industrial Machinery & Equipment
Building Materials
Food & Beverage
Commercial & Residential Construction
Management Consulting
Accounting Services
Restaurants
Investment Banking
Freight & Logistics Services
Civil Engineering Construction

Primary
sub-industries

*Belgium, **UAE, Luxemburg, Ireland**,*
*France, Netherland, Germany, **Austria,***
***Switzerland**, Italy, UK*

Based on customer insights and potential opportunities, the following targeting strategy for paid social **advertising is likely to** generate faster revenue with improved returns

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SEO
Strategy

Directive

SEO Strategy
Recommended actions to drive organic growth and awareness

SEO OPPORTUNITY

Position (Client) as the Best Choice for a Financial Performance Platform at All Stages of the Buyer's Journey

By optimizing our existing core page content and creating content to lead in topical authority for key search terms, we will be primed for success.

We'll also work to optimize conversion rates to capitalize on the growing high intent traffic.

	Annual Search Volume	Predicted Clicks (High)	Predicted Clicks (Mid)	Predicted Clicks (Low)
Total Search Volume	764,760	136,739	45,121	8,412
Total BOFU Clicks	252,960	45,229	14,925	2,783
Total MOFU Clicks	95,880	17,143	5,657	1,055
Total TOFU Clicks	415,920	74,366	24,539	4,575

Link to spreadsheet

63K (+86% YoY)

Estimated Incremental Organic Sessions*

This would be for North America.

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SEO Strategy
Recommended actions to drive organic growth and awareness

SEO OPPORTUNITY

Align Your User Journey with the Problems Finance Leaders Are Trying to Solve

Website infrastructure is a crucial element of not just SEO, but also content production and website growth.

We have the opportunity to re-craft the navigation to better speak to your customers pain points to take your ICP from apathy to action.

Source: https://www.venasolutions.com/

Directive

Our SEO strategy is centered around expanding our SERP market share and crafting content that can speak to our ICP at every stage of the buying journey

4 KEY INITIATIVES

01

Core Page Optimization

Optimize existing core pages to rank higher for our target keywords, and create new pages that speak directly to our ICP in a way that converts them.

02

Conversion Rate Optimization (CRO)

Implement and test best practices across the site to convert more existing and new users to directly impact pipeline revenue.

03

Content Strategy & Thought Leadership

Optimize content to attract more top & middle of funnel traffic and create & amplify quality content, building on your deep knowledge of financial platforms, to establish topical authority and increase market share.

04

Share of SERP Outreach

Appearing on 3rd party sites, listicles, and review platforms will drive high-intent traffic and boost credibility of (Client)'s brand.

Directive,

By targeting Top & Middle of Funnel content around key Financial Performance categories we could bring +28K new NAMER visitors per year*

Keyword Theme	Annual Search Volume
FP&A	548K
Account Reconciliation	133K
AI Applications in Finance	54K
Budgeting & Forecasting	48K
FPM & CPM	7K
Bottom Up Planning	6K
Financial Consolidation & Close	4K
Search Volume Potential	**800K**

Opportunity breakdown

Top of Funnel Content

Headline Examples:

- Best Practices for Financial Planning & Analysis
- The Ultimate Guide to Budgeting and Forecasting
- Understanding Account Reconciliation
- What is Financial Performance Management? A Complete Guide

Middle of Funnel Content

Headline Examples:

- Ways to Improve the Budgeting & Forecasting Process
- What Is Agile Finance? An Expert Guide
- Essentials for choosing integrated business planning software
- Navigating AI's Impact on Accounting: Uses, Trends and Tools

All initial topic proposal (20 Total)

Directive

*Based on the average CTR from search volume > organic traffic, for keywords between positions 3 and 10 of 3.5%.

By optimizing existing content at the same time as publishing new content, we can reach our goals faster

We reviewed all Blog pages and prioritized actions for these pages. **High Priority** blog pages rank for keywords with high volume and are close to the top 10. **Medium priority** blog pages rank for keywords with lower volume and are farther from top 10.

Action	# of URLs	High Priority	Medium Priority	Clicks L12 M (GSC)	% of Blogs	% of Blog Traffic
Keep	73			14,820	7.3%	81.4%
Refresh	247	15	25	3,108	24.7%	17.1%
Sunset/Redirect	680			268	68.0%	1.5%
Grand Total	**1,000**	**15**	**25**	**18,196**	**100%**	**100%**

Link to spreadsheet

Next steps:
- Review pages we recommend to refresh/repurpose and sunsetting/redirecting.
- If approved, we would proceed to create briefs for content refreshes in the coming months, as well as redirecting pages to sunset.

Directive,

The Resources section can contribute to growing organic traffic to your site, by adding it to your root domain

We can also help you create long-form content that lives in your Resources section (e.g. e-books, templates). Like it is for your competitors, having your Resources page within your root domain can be a key driver of organic traffic to your site.

Source: SEM Rush. The data is for the month of June 2024.

Directive

We can start boosting our organic presence through transcribing white papers and webinars to use on the web page. Search engines will only then be able to pick up the content to show to search users
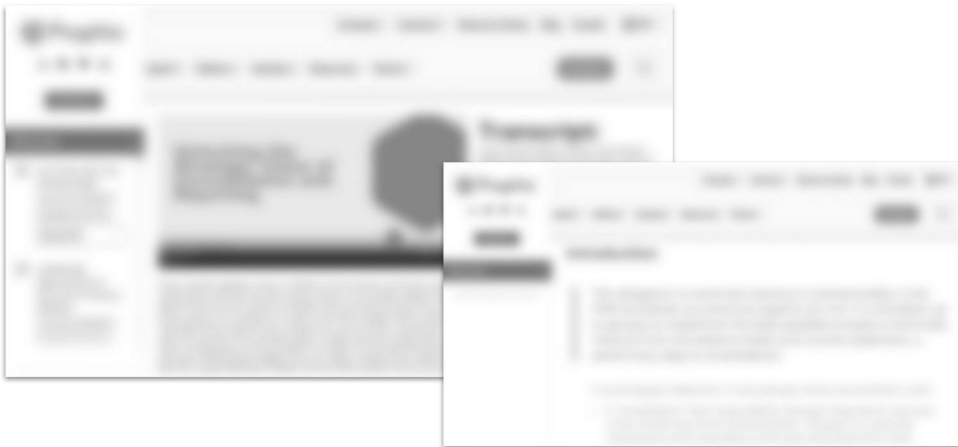
By targeting the Bottom of the Funnel through both optimization & new Core Pages, we can improve traffic up to +8.6K new NAMER visitors per year*

Keyword Theme	Annual Search Volume
FP&A Software	47K
Budgeting & Forecasting Software	127K
Financial Reporting Software	21K
Financial AI Software	12K
Workforce Planning Software	10K
Financial Modeling Software	7K
Financial Consolidation & Close Software	8K
Financial Management Solutions	9K
Financial Performance Management Software	4K
Search Volume Potential	**245K**

We can learn from competitors on how they frame their offering around **Jobs to be Done** that speak to the ICP.

Link to Opportunity Breakdown

*Based on the average CTR from search volume > organic traffic, for keywords between positions 3 and 10 of 3.5%.

Optimizing our core page navigation to better align with our ICP will expand our search market share and improve odds of ranking for target keywords

Have Platform Overview standout, for a less cluttered drop down.

Clear distinction of platform capabilities vs. use case, appealing to visitor intent.

Separate Industries from Use Cases, to make sure these don't get lost in the drop down.

New potential capabilities pages, that speak to key features.

Highlight Integrations, to better demonstrate this capability.

Focusing a drop down on Use Cases gives room for more segments.

Home		Platform				Use Cases			Industries	Resources	Partner	CTA
		Platform Overview	Capabilities	Integations	Pricing	FP&A	Financial Consolidation & Close	Financial Reporting	Construction	Blog	Our Partner Network	See demo
	Customer Reviews		Artificial Intelligence	Data Integrations	Learn more	Financial Planning & Analysis	Financial Close Management	Reporting & Analytics	Healthcare	Customer Stories	Become a Partner	
	Experience the Prophix Way		Security	Microsoft Power BI		Budgeting & Planning	Financial Consolidation	ESG Reporting	Higher Education	Product Demos	Partner Portal	
			Workflow	MS365 Add-In		Cashflow Planning	Account Reconciliation		Manufacturing	Webinars		
			Modeling			Forecasting			Professional Services	Whitepapers		
			Cloud Based			People Planning			Utilities	Resource Library		
						Integrated Business Planning			See all			
						Intercompany Management						

Pages We Already Have
Pages We Need to Build
Buttons

Site Architecture Competitive Analysis

Directive

The gap in keyword ranking positions and word count vs. competitors shows that there's potential to expand & optimize your key core pages

On-page optimizations, like more use of keyword-rich text & internal linking, can help your core pages close the gap in target keyword ranking vs. your competitors.

Keyword	(Client) Position	Core Page	URL	Organic Clicks YTD	(Client) Word Count	Competitor	Competitor Position	Competitor Word Count
	15	Homepage	(page)	12,300	1,211	(Competitor)	2	3,785
	6	Platform Overview	(page)	127	1,493	(Competitor)	5	4,125
	-	AI Insights	(page)	73	1,234	(Competitor)	1	2,504
	75	Integrations	(page)	274	1,118	(Competitor)	8	3,926
	20	Consolidation	(page)	120	1,195	(Competitor)	3	4,578
	67	Budgeting & Planning	(page)	230	1,373	(Competitor)	3	3,781
	17	Financial Close	(page)	21	1,371	(Competitor)	1	5,716
	20	FP&A	(page)	65	1,475	(Competitor)	2	4,125

We can learn from other SERP competitors on how they're able to rank high on key search terms with dedicated core pages

Directive,

One of the most effective ways to strengthen your pages is through internal links as they establish information hierarchy and pass link equity.

Blog Post

https://www.client.com/blog-post/

Impressions L12M: 56K
Clicks L12M: 1.8K
Keywords ranking: 77

Use Cases Page

https://www.client.com/use-case-page/

Impressions L12M: 9.7K
Clicks L12M: 65
Keywords ranking: 4

Capabilities Page

https://www.client.com/capabilities-page/

Impressions L12M: 4.3K
Clicks L12M: 73
Keywords ranking: 5

Source: Google Search Console, SEMRush

Directive

We will help maximize your organic brand presence across the search engine results page (SERP)

Pursuing High-Intent Opportunities

We'll follow up with an exhaustive list of all the potential 3rd party sites (Client) should be on or move up in ranking, including contact information to conduct the outreach.

After the full Share of SERP audit, we'll help you pursue the following actions:

1. Reach out to all 3rd party sites that have contact info.
2. Determine what needs to happen to show up or move up in ranking (e.g. pay per click, seek out customer reviews, etc).
3. Work with your team to execute the recommendations.

Share of SERP keywords

Directive

Design & CRO Strategy

Our Key Competitors

Competitors are all telling a similar story, with good use of branding and messaging throughout. While some may overwhelm users with excessive information and lengthy pages that go against UI/UX best practices, others lean in to the human element for greater connection to the ICP.

Because there is very little differentiation in the marketplace when our ICP compares options from website to website, we must consider **how (Client) can standout** in this 'sea of sameness' to be the #1 choice for our ICP.

Incorporating human images engaged with the product can **enhance emotive visual hierarchy** connecting directly to your ICP, while incorporating a 'less is more' strategy on the homepage could increase user engagement, and the chances for more conversions.

NA Competitor

UK Competitor

EU Competitor

Directive,

(Client) Homepage/Site

Overall assessment: **Strong and cohesive branding throughout with trust-building social proof**

Quick wins:

- Add **diverse images of your ICP engaged with the product,** particularly in the hero sections above the fold.

- Include **more instances of the 'See demo' CTA** throughout site to increase the likelihood of a visitor clicking on the button.

- **Condense overall page length** to align with UI/UX best practices and to avoid unnecessary elongation that could lead to user drop-off.

- **Simplify form on Demo page,** and add social proof/testimonials to draw more leads into the sales funnel.

Future growth opportunities:

- Engage your ICP immediately by clearly detailing the differentiating (Client) value propositions with a **brand overview video**

- **Tailor to your ICP** with unique landing pages and continuous testing of design elements to increase the chances for more conversions.

Directive
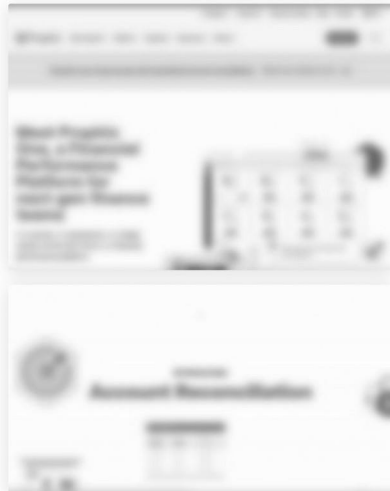
(Client) Homepage

Streamlining the user journey

Add diverse human images of your ICP engaged with the product, particularly above the fold

Adjust spacing to ensure partner and client logos appear above fold to reinforce social proof immediately before scroll

Condense overall page length to limit excessive page length that goes against UI/UX best practices and could lead to user drop-off.

In addition to the use of the sticky nav at top of the page, incorporate additional "See demo" CTAs throughout the scroll to increase the chances for more conversions

See demo

Utilize a 3X grid of customer stories/reviews higher up on page to hook ICPs with social proof

Directive,

UI Engagement

Comparing the UI platform engagements with the competition, we can see that:

Our motion design could be more engaging: We use minimal animation, mainly for clients served image slider, without conveying specific actions. This approach limits engagement and fails to enhance the user experience as effectively as it could.

With *Planful*, we can see larger **platform UI image animations** and **dynamic animations**, effectively showcasing platform actions to ensure easier understanding for ICPs as they scroll the page. None of our other main competitors have incorporated this immersive UI/UX strategy into their website experiences.

(Competitor) is our main competitor to lead with a brand overview explainer video above the fold to engage the ICP with their differentiating value proposition. Adding a video above the fold can help increase views and potentially entice visitors to want to find out more as **stats show that landing pages with video can increase conversions by 86%.**

Directive

A/B Testing

We can determine CTA and key element variables on Core Pages that can be A/B tested to pinpoint the best action that resonates with our ICP, leading to the possibility for greater conversions and more efficiency.

Trying out more hard-hitting actions, copy lines and alternative colours that will stand out, along with adding more of the main CTAs throughout the pages may lead to more clicks.

Original

See Demo

Variant A

Get a Demo

Variant B

See Demo

See Demo

Directive
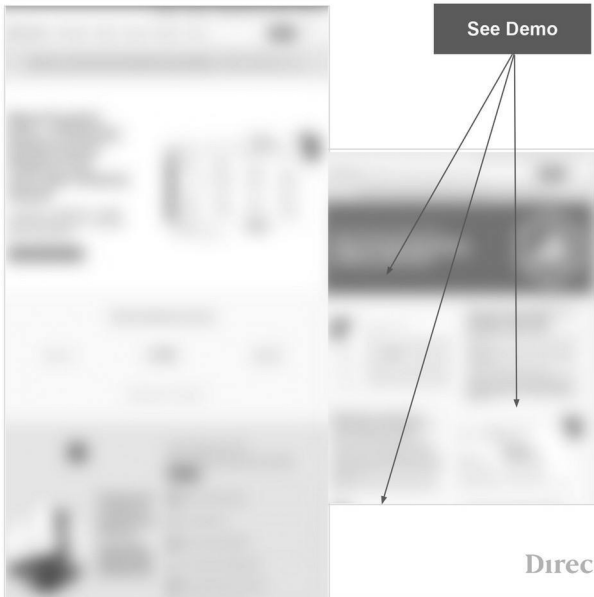
Demo sign up page

Optimize the Demo page to draw more leads into the sales funnel.

Social proof: move brand logos that are lower on the page up to the empty space above the fold.

Ideally: have a **simplified version of the form** that reduces fields and only asks for essential information.

Bring a copy of the 3X testimonials in the Homepage to the Demo page.

Directive,

Demo sign up page

Apply additional best practices to further optimize the demo page and increase form fills.

Compelling messages that stand out.

Real, quantifiable outcomes achieved by customers

A simplified version of the form that only asks for essential information. The rest can be collected by Sales.

Testimonials from real customers.

Additional testimonials and reviews, with links to existing case studies.

Directive,

6 Month Roadmap

	H2 2024 Restructure		H2 2024 Optimize	
Goal				

	Initiatives Q3	Initiatives Q4	Initiatives Q3	Initiatives Q4
Strategy	1. Optimize OCT to track against key pipeline goals 2. Restructure Google Ads account 3. Action on media plan and plan budgets 4. Test bidding strategies to see what drives the most mid market leads. 5. Test Expanded LinkedIn Targeting 6. Launch landing pages 7. Build SEO content briefs 8. Update navigation	1. Scale Campaigns launched in Q3 based on performance 2. Consider increasing spend to $100K/mo 3. Explore additional channel recos 4. Ensure strategy alignment on optimization strategies 5. New content briefs	1. Optimize campaigns based on ICP engagement with campaigns. 2. Testing Search Intent of ICPs 3. A/B test Google and LinkedIn copy 4. New content opportunities 5. CRO	1. Plan out Q1 2025 based on H2 performance 2. Iterate on campaign testing 3. Further optimize content and core pages 4. Review additional CRO opportunities based on H2 performance 5. Update NSM and optimize

Business Initiatives	Web, Campaign and Landing Page optimization, Discoverability, & Conversion Management
Ongoing	Reporting

Directive,

Deliverables

SEO Deliverables Completed

With handy links to all Project Phase documents

Site Architecture Research

Link to document →

Content Opportunity

Link to document →

Backlink Audit

Link to document →

International Content Opp

Link to document →

Technical Audit

Link to document →

Keyword Research Phase I

Link to document →

Share of SERP Audit

Link to document →

LTV:CAC

Link to document →

Keyword Research Phase II

Link to document →

Content Consolidation Audit

Link to document →

Directive

Paid Media Deliverables Completed

With handy links to all Project Phase documents

Paid Media Audit

Link to document →

LTV:CAC

Link to document →

ICE Prioritization

Link to document →

Paid Keyword Audit

Link to document →

Paid Keyword Research

Link to document →

Share of SERP

Link to document →

Customer Segments & Personas

Link to document →

Closed Won Enriched Customer List

Link to document →

Conversation Ad Flow

Link to document →

Directive,

Thank You

Appendix

Your Ideal Customer Profile

Establishing your ICP based on our research and analysis, budget allocation, and historical performance data.

Customer Personas

- Reporting Virtuoso
  - Director of Finance
  - Director of Accounting
  - Controller
- Financial Architect
  - CFO
  - VP of Finance

Firmographic Profile

Our paid social campaigns will initially target:

- Industries
  - Manufacturing
  - Construction
  - Business Services
- Company Sizes:
  - 250-999 employees (Mid-market)
  - 1,000-4,999 employees (Enterprise)
- Revenue Range:
  - $50M-$250M (Mid-market)
  - $250M-$1B (Enterprise)

Extended ICP Opportunity

With additional budget, we recommend expanding our audience to fully target financial leader roles, with segmentation between mid-market and enterprise leadership.

ICP Analysis

Our ICPs allow us to simultaneously target our brand champions as well as our current decision-makers.

Directive

Offline Conversion Tracking

To optimize pipeline performance

With full OCT prioritization, we can begin optimizing (Client)'s campaigns towards SQL and higher pipeline actions.

This will help ensure ads are being seen by users most likely to drive revenue.

User clicks on ad to arrive on site

User submits lead form

Lead info + GCLID are stored in advertiser's CRM

Sale/deal is completed offline

Offline data is uploaded into Google Ads

Directive
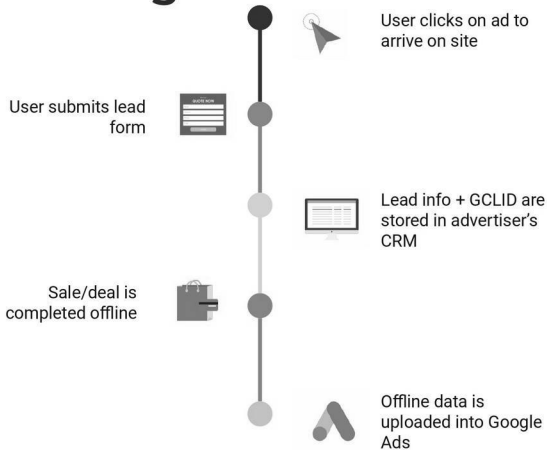
Paid Media Strategy
Recommended channels and tactics
to achieve our NSM

OPPORTUNITY

Test Priority to Value for Conversion Optimization

To drive more pipeline, higher priority should be allocated to conversions that are more likely to provide value. Testing out bid strategy type "Maximize conversion value" along with OCT conversions will have the most impact to desired outcomes.

With multiple primary conversions active, maximizing by conversion and click volume will not differentiate a form fill vs. booking a demo.

Campaign ↓	Bid strategy type
Retargeting Display CAN & US	Maximize conversions
Competition-EN-World	Maximize clicks
Brand- CA_EN	Maximize clicks
Brand - US_EN	Maximize clicks
BOFU - Demo - US_EN	Maximize conversions (Target CPA)
BOFU - Demo - FR_FR	Maximize conversions
BOFU - Demo - US_EN Forecasting	Maximize conversions

Source: Google Ads

Directive

Increase Search Targeting to Recent Visitors

Procuring software this important is a time consuming process for most organizations, meaning that someone that has visited your website recently is likely not done with their software buying journey and it's worth getting back in front of them.

Increasing bids to recent visitors will keep you top of mind when placed against top competitors.

Outcome: Higher search impression share and more conversions from qualified visitors.

			Search exact match IS	Conv. rate	Conversions	Cost / conv.
			61.73%	20.00%	4.00	$40.29
All visitors (AdWords)	$478.16	47.74%	18.54%	73.01%	8.33%	4.00	$119.54
All visitors across	$770.15	44.08%	19.03%	64.37%	6.58%	5.00	$154.03
Business Services Business Technology	$358.95	59.35%	16.13%	68.29%	6.38%	3.00	$119.65
Technology	$1,750.83	54.07%	14.34%	64.43%	5.80%	13.00	$134.68

Source: Google Ads

Directive
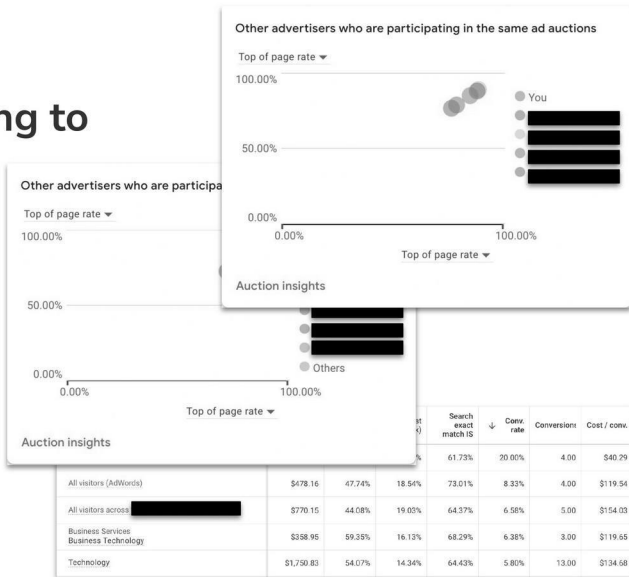
Paid Media Strategy
Recommended channels and tactics
to achieve our NSM

**(Client) is well-known but
not typically in the top 3
spots on directories**

(Client) is available in all main
directories, however positioning
typically ranges from 4-6, with
some landing past the 10th
position.

With such a competitive market,
it's important to stay above the
fold with more recent review
generation or pay-to-play for
higher visibility.

Source: G2 Grid® for CPM

Directive

Paid Media NSM Analysis Q3 2024
H2 Goal is 479 SQLs

- Q3 is 336 SQLs (318 from paid)

Goal Setting

Goal Type: Stage 2 - SQLs ▾

Stage 2 - SQLs Goal	318.00	106 per month from paid
Quarterly Budget	$300,000	$100k per month
Cost-per-Stage 2 - SQL Needed	$943	

Reality Check

1. Start off with entering the Target CTR and CVR.

Ex. I expect my ads will have a X% CTR and my LP to have a X% CVR.

Ad Click-through Rate:	4.51%	What is your target CTR?
Landing Page Conv. Rate:	3.66%	What is your target LP CVR?

2. Compare the Impr. and Clicks needed with the platform estimates.

Ex. I need 100k impr, but LinkedIn is forecasting only 50K with my audience size.
Ex. I need 30k clicks, but Google Ads is forecasting only 10K with my search volume.

Impressions Needed:	1,014,746	Is my TAM large enough for this?
Clicks Needed:	45,765	Is my audience/keyword volume big enough?
Cost per Click Needed:	$6.56	Is this realistic based on my channel mix?

Projections

	Goal	Cost-per
Leads	1,675	$179
MQLs	1,025	$293
Stage 2 - SQLs	318	$943
Customers	35	$8,571

LTV:CAC Ratio	33.99
Est. Revenue	$10,196,830
Net Return	$9,896,830

Directive‚

Paid Media NSM Analysis Q4 2024
H2 Goal is 479 SQLs

- Q4 is 144 SQLs (124 from paid)

Goal Setting

Goal Type: Stage 2 - SQLs ▾

Stage 2 - SQLs Goal	124.00	106 per month from paid
Quarterly Budget	$300,000	$100k per month
Cost-per-Stage 2 - SQL Needed	$2,419	

Reality Check

1. Start off with entering the Target CTR and CVR.

Ex. I expect my ads will have a X% CTR and my LP to have a X% CVR.

Ad Click-through Rate:	4.51%	*What is your target CTR?*
Landing Page Conv. Rate:	3.66%	*What is your target LP CVR?*

2. Compare the Impr. and Clicks needed with the platform estimates.

Ex. I need 100k impr, but LinkedIn is forecasting only 50K with my audience size.

Ex. I need 30k clicks, but Google Ads is forecasting only 10K with my search volume.

Impressions Needed:	396,205	*Is my TAM large enough for this?*
Clicks Needed:	17,869	*Is my audience/keyword volume big enough?*
Cost per Click Needed:	$16.79	*Is this realistic based on my channel mix?*

Projections

	Goal	Cost-per
Leads	654	$459
MQLs	400	$750
Stage 2 - SQLs	124	$2,419
Customers	14	$21,429

LTV:CAC Ratio	13.60
Est. Revenue	$4,078,732
Net Return	$3,778,732

Directive,

Original Paid Media LTV:CAC Analysis

What we learned:

Lifetime Value (LTV)	
Gross Margin (%)	85%
Customer Lifespan (months)	
Monthly Average Order Value	
Channel-level AOV's?	No ▼
Lifetime Value (LTV)	$291,338

- Limited lead and customer results show low LTV:CAC ratio of 0.7:1. Our ideal target is 3:1 for industry baseline.

- Google Ads was the most effective at driving leads, with the lowest CP MQL, and the only channel to drive an SQL and customer in Q1 2024.

- LinkedIn Ads were not effective at driving qualified leads, as campaigns did not properly exclude irrelevant targeting and had limited lead-gen opportunities.

- Microsoft & LinkedIn Ads had similar CP MQL but neither channels were successful at moving leads down pipeline.

Recent Quarter Actuals

	Total	Google Ads	LinkedIn Ads	Microsoft Ads
LTV:CAC Ratio	0.7	1.04	-	-
Total Spend	$413,494	$281,198	$49,148	$83,148
Leads	0			
MQLs	37	29	3	5
Stage 2s - SQLs	9	9	0	0
Customers	1	1	0	0
CP Lead	-	-	-	-
CP MQL	$11,176	$9,696	$16,383	$16,630
CP Stage 2s - SQL	$45,944	$31,244	-	-
CP Customer	$413,494	$281,198	-	-
Lead > MQL	-	-	-	-
MQL > Stage 2s - SQL	24.3%	31.0%	0.0%	0.0%
Stage 2s - SQL > Customer	11.1%	11.1%	-	-
Lead > Customer	-	-	-	-

(Client) Historical Data & LTV:CAC Analysis

Directive,

Original Paid Media
North Star Metric (NSM)

46 SQLs in Q3

With our new strategic direction, and optimizations, our primary objective
will be to see our **SQLs grow by 100% QoQ**.

Our focus will be to increase efficiency in existing platforms, first by
maximizing the spend on channels with the highest opportunities, and then
narrow our targeting to drive more qualified SQLs.

Directive,

Paid Media LTV:CAC Roadmap

What we anticipate:

Q3 Tentative Goal:

18 SQLs

We based this goal on Q1 2024 historical data, industry benchmarks, as well as $414k quarterly budget for Q3 to drive lead volume.

Goal Setting

Goal Type: Stage 2 - SQLs

Stage 2 - SQLs Goal	18.00
Quarterly Budget	$413,494
Cost-per-Stage 2 - SQL Needed:	$22,972

Reality Check

1. Start off with entering the Target CTR and CVR.
Ex. I expect my ads will have a X% CTR and my LP to have a X% CVR.

Ad Click-through Rate:	4.51%	What is your target CTR?
Landing Page Conv. Rate:	3.66%	What is your target LP CVR?

2. Compare the Impr. and Clicks needed with the platform estimates.
Ex. I need 100k impr, but LinkedIn is forecasting only 50K with my audience size.
Ex. I need 30k clicks, but Google Ads is forecasting only 10K with my search volume.

Impressions Needed:	57,553	Is my TAM large enough for this?
Clicks Needed:	2,596	Is my audience/keyword volume big enough?
Cost per Click Needed:	$159.30	Is this realistic based on my channel mix?

Projections

	Goal	Cost-per
Leads	95	$4,353
MQLs	58	$7,129
Stage 2 - SQLs	18	$22,972
Customers	2	$206,747

LTV:CAC Ratio	1.41
Est. Revenue	$582,676
Net Return	$169,182

Conversion Rates

Lead > MQL	61%
MQL > Stage 2 - SQL	31.0%
Stage 2 - SQL > Customer	11.1%

Highlighted rate based on industry benchmark.

Directive

Paid Media LTV:CAC Roadmap

What we strive for:

Q3
Goal:

36 SQLs

Our ideal goal is 4x the current performance to meet a 3:1 LTV:CAC ratio.

Goal Setting

Goal Type: LTV:CAC

LTV:CAC Goal	3.00
Quarterly Budget	$413,494
Cost-per-Customer Needed	$97,113

Reality Check

1. Start off with entering the Target CTR and CVR.
Ex. I expect my ads will have a X% CTR and my LP to have a X% CVR.

Ad Click-through Rate:	4.51%	*What is your target CTR?*
Landing Page Conv. Rate:	3.66%	*What is your target LP CVR?*

2. Compare the Impr. and Clicks needed with the platform estimates.
Ex. I need 100k impr, but LinkedIn is forecasting only 50K with my audience size.
Ex. I need 30k clicks, but Google Ads is forecasting only 10K with my search volume.

Impressions Needed:	115,105	*is my TAM large enough for this?*
Clicks Needed:	5,191	*is my audience/keyword volume big enough?*
Cost per Click Needed:	$79.65	*is this realistic based on my channel mix?*

Projections

	Goal	Cost-per
Leads	190	$2,176
MQLs	116	$3,565
Stage 2 - SQLs	36	$11,486
Customers	4	$103,374
LTV:CAC Ratio	2.82	
Est. Revenue	$1,165,352	
Net Return	$751,858	

Conversion Rates

Lead > MQL	61%
MQL > Stage 2 - SQL	31.0%
Stage 2 - SQL > Customer	11.1%

Highlighted rate based on industry benchmark.

Directive,

Additional Opportunities

Assist (Client) In International SEO

Providing SEO strategy and guidance to tailoring content to resonate with key European audiences and Europe SERP listings.

Deliverables: Recommendation and guidance around best practices to rank and get results in target countries:

- Hreflang & URL structure
- Keyword research
- Content localization
- Translation consultation
- Share of SERP (directories/listicles)

Improving keyword-rich text on your Core Pages and throughout the site will help to strengthen your keyword relevance.

We started recommending **metadata** & **H1s** for your core pages. We'll partner with your team to further optimize your core pages; we'll recommend **word count**, **headings** (H2s, H3s) and use of **internal linking** to help your pages rank higher in SERPs.

Core Page Metadata & H1 recommendations

Directive

# There's opportunity to reclaim lost link equity by fixing broken backlinks

We conducted a backlink audit and found that your authority score* is comparable to your competitors, but there is opportunity to fix your broken backlinks.

Company	Authority Score*	Referring Domains	Total Backlinks	NoFollow Backlinks	% NoFollow
(Client)	39	2,536	38,374	3,753	9.8%
(Competitor)	42	2,846	13,694	1,715	12.3%
(Competitor)	58	33,366	7,885,167	1,146,307	14.9%
(Competitor)	41	1,875	116,376	58,195	50.0%

Backlink Audit

Redirecting backlinks with 404 codes can help you reclaim some of the link equity lost through the broken links.

We narrowed the list down to 129 broken backlinks, based on how recently the external site was last seen and number of backlinks.
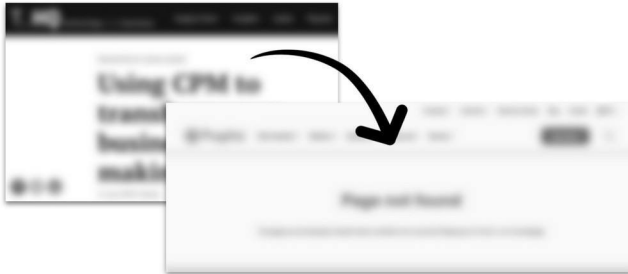
Directive,

Personas

Meet Cindy,

The Financial Architect

Chief Financial Officer, VP of Finance

Challenges & High-Level Needs

We need a platform that consolidates multiple systems to access real-time financial analytics for reporting and budgeting, with forecasting for actionable insights.

OKRs

Improve operational efficiency, and financial reporting accuracy, while enhancing budgeting and forecasting processes.

Risks & Fears

We need a secure tool to replace manual processes that are slow and inefficient, and can often lead to data inaccuracies.

JTBD

- Assembles and develops a top-tier finance team
- Leads comprehensive financial strategy and planning efforts
- Delivers strategic financial insights to the executive team and stakeholders

Personas Worksheet

Directive

Meet Tom,

The Reporting Virtuoso

Director of Finance, Director of Accounting

Pain Points & Challenges

- Integrating data from multiple sources
- Creating reliable forecasts and budgets
- Analyzing large volumes of data while managing time efficiently

Risks & Fears

- Inaccurate data leading to bad forecasting and poor decision-making
- Increased workload leading to significant delays
- Breaches in data security compromising sensitive information

OKRs

Ability to provide accurate reporting and forecasting, in a quick and secure process.

JTBD

- Automates data collection and reporting
- Conducts detailed financial analysis, with accurate forecasts and budgets
- Ensures compliance with financial standards
- Improves efficiency and supports financial strategic decision-making

Directive

Meet Clark,

The Data Dynamo

Financial Analyst, Controller

Pain Points & Challenges

- Aggregating financial data from various departments and systems
- Ensuring accuracy and compliance in financial reporting
- Reducing reliance on manual data entry

Risks & Fears

- Incorrect financial data affecting forecasting and decisions
- Delays impacting reporting timelines
- Penalties due to regulatory failures
- Unauthorized access to financial data

OKRs

Ensure data accuracy, streamline the financial close process, and enhance forecasting efficiency while maintaining regulatory compliance

JTBD

- Manages accounting operations
- Consolidates financial data while automating routine tasks
- Ensures data accuracy and compliance
- Oversees financial close processes

Directive