

2023 Annual Business Review

October 2023

+ Directive,

Agenda

Agenda

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- 2023 Year In Review
- 2023 By The Numbers
- What Worked, What Didn't,
and What Was Left on the Table
- Looking Forward to 2024
- Growth Roadmap & Next Steps
- Pricing for Q4 and Beyond

2023

Year In Review

Directive

(Client) + Directive 2023 Year in Review

Q1'23	Q2'23	Q3'23	Q4'23
Discovery and Handoff <ul style="list-style-type: none">• Took over control from (Client) team on January 16th after our Project Presentation.• Saw stellar first month performance with a 2,530% increase in GAds conversions in just 2 weeks.• Initial SEO work was being applied and immediate gains in non-branded keywords were found.• Designed many new landing pages, including vital Shipper page, TMS, LTL Blog, Ebooks, & Thank You pages.	Segmenting and Testing <ul style="list-style-type: none">• Segmented Mid Market into two groups - Upper MM and Lower MM - to enhance our LinkedIn performance.• Expanded the Paid Media team, launched competitor campaigns, and segmented mobile devices in GAds into its own campaign.• Began working on new website structure and continued Glossary efforts.• Designed many ad sets for video ads, retargeting ads, and more.	QBR and Google Ads 2.0 <ul style="list-style-type: none">• Directive and (Client) meet in person for the first time to review Q2, which ended with over 100% QSU growth compared to Q1 at nearly half the cost.• Directive takes on LaunchSquad partnership ownership to ensure content is aligned and built to succeed ahead of new website.• Directive restructures Google Ads focusing on keyword segmentation with tailored ads and conversion-based bidding to improve overall efficiency	Website Launch and LinkedIn 2.0 <ul style="list-style-type: none">• One week before Q4 started, (client).com is reborn, boasting 4 new core pages, a revamped navigation, and begins to rank for new and important keywords.• LinkedIn gets an overhaul, as we aim to improve quality of QSUs and start to drive 1Ls. We crafted new campaigns with tighter segmentations and new ad copy that's more aligned with our ICPs.• Design is focused on CRO optimizations of core conversion pages and refreshing our ads with a bolder look.

2023

By The Numbers

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1L Performance is Night & Day Compared To January

	1st Loads	Cost-Per-1L	QSU > 1st Load
January 2023	6	\$28,675	2.79%
September 2023	56	\$6,494	4.33%
% Change	833.33%	-77.35%	55.31%

	1st Loads	Cost-Per-1L
Total 1Ls (Jan-Sep)	201	\$9,583.57

**Including Paid Search and Paid Social*

QSU Performance Saw Similar Improvements

	Spend	QSUs	Cost-Per-QSU
January 2023	\$172,050.93	215	\$800
September 2023	\$363,678.56	1,292	\$281
% Change	+111.38%	+500.93%	-64.82%

	QSUs	Cost-Per-QSU
Total QSUs (Jan-Sep)	7,009	\$271.35

**Including Paid Search and Paid Social*

We Were Able To Scale While Improving Efficiency

	Total Spend	Total QSUs	Cost-Per-QSU	Total 1Ls	Cost-Per-1L
Q1	\$433,014.08	1,047	\$413.58	32	\$13,531.69
Q2	\$507,371.54	2,268	\$223.71	42	\$12,080.27
Q3	\$985,912.17	3,781	\$260.75	127	\$7,763.09
Total	\$1,926,297.79	7,009	\$271.35	201	\$9,583.57

**Including Paid Search and Paid Social*

Lead Tracking Highlights Organic Conversion Potential

While new tracking for organic only goes as far back as late August, we now have a collection of different goal types in GA4 to demonstrate organic search's potential as a conversion driver

Event name +		↓ Conversions
		14,453.00 100% of total
1		11,786.00
2		1,715.00
3		428.00
4		288.00
5		134.00
6		39.00
7		28.00
8		20.00
9		15.00

- Since tracking started, organic search drove 502 goal completions for confirmed hand raisers with 59 of those completions coming from TMS and Managed Trans
- New goals will help us make more informed strategy decisions and better prove our how organic search impacts (Client's) bottomline

Heavily Reliant on Brand Traffic in 2023

Organic has grown by ~7k clicks so far in the back half of 2023. New content is driving improvements in non-brand visibility, but brand traffic has an outsized effect on overall results. The solution is a continued, focused push on expanding our non-brand footprint in the arenas of managed transportation, TMS, and shipper focused freight



*Comparison Period = 5/17 - 9/30 vs 12/31 - 5/16
Page Cat chart from GA & Query Type from GSC*

Brand Vs Non-Brand (Excluding (client).com)

As mentioned, the majority of branded traffic that is driving our growth is coming from the (client).com domain sign up pages. Here we want to show that while brand can be a powerful traffic driver, it is also dangerous to rely on it as a consistent source of clicks. To insulate ourselves from branded search interest swings, we need to invest more in non-brand content.

Query Type ▾	Clicks CP ▾	Clicks PP ▾	Abs Diff ▾	Rel Diff ▾
Brand	155,223	172,941	-17,718	-10%
Non-Brand	4,397	4,167	230	6%

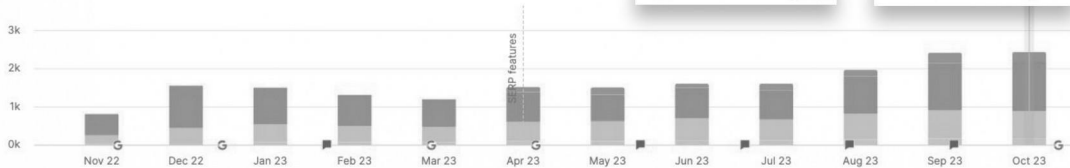
Comparison Period = 5/17 - 9/30 vs 12/31 - 5/16
Page Cat chart from GA & Query Type from GSC

62% Increase In Page 1 & 2 Keywords

The number of non-brand keywords ranking in search viable positions has grown steadily since we started working on the site. Everything from initial core page title tag updates to blog/glossary content additions contributed to this growth, so our aim should be focused on both generating more pages that rank and ensuring conversion actions are accurate.

Organic Keywords Trend

☒ Top 3 ☒ 4-10 ☒ 11-20 ☐ 21-50 ☐ 51-100 ☒ SERP Features ☐ Notes



January 2023

Top 3	86
4-10	465
11-20	953
SERP Features	0

Total 1,504

October 2023

Top 3	168
4-10	731
11-20	1,283
SERP Features	254

Total 2,436

What Worked in 2023?

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Improved Efficiency by Transitioning to Conversion-Based Bidding Strategies

As we put more emphasis on our bids toward conversions, incorporated more down-funnel conversion signals, and applied bid limits, we saw an impact to the bottom line while scaling our spend significantly.

Brand Campaigns

*Moved away from Target
Impression Share*

Spend	QSUs	CpQSU	Converted Contacts	CpCTC
+42%	+23%	+16%	+61%	-11%

**comparing 9/8-9/30 from 8/16-9/7*

Non-Brand Campaigns

*Incorporated Target CPA into our
bid strategy*

Spend	QSUs	CpQSU	Converted Contacts	CpCTC
+68%	+36%	+24%	+224%	-48%

**comparing 8/8-9/30 from 6/15-8/7*

Expanded Keyword Coverage & Scaled Spend With Account Restructure

Our new restructure allowed us to condense the amount of keywords and split our keyword themes into their own campaigns by match type. This allowed us to monitor performance more efficiently and scale our spend to improve visibility across our core keywords.

58 Ad Groups, 864 KWDs

Nonbrand_Generics_Exact	
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	T
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	L
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	F
CM2144459-search-google-nonbrand	T
CM2144459-search-google-nonbrand	F



+78% Spend

5 Ad Groups, 105 KWDs

Nonbrand_Transportation_Mode_Exact	
CM2333185-search-google-nonbrand	
CM2333185-search-google-nonbrand	
CM2333185-search-google-nonbrand	
CM2333185-search-google-nonbrand	
CM2333185-search-google-nonbrand	

40% of Target Keywords Saw Improvements in 2023

We prioritized core pages early in the year, ensuring our keyword targeting across metas and on-page content reflected the right keywords to ensure increased visibility.



Interim Core Pages to Start TMS Keyword Ranking

Despite roadblocks in tracking conversions on landing pages, we saw success through the optimizations on the shipper site page. Heatmaps informed our decision to bring the solution navigation higher and the net new solution pages (MT, TMS, Freight Network) we created helped **rank for TMS keywords we were not previously ranking for**.

Original: Solutions are buried further down the page and potentially losing users attention



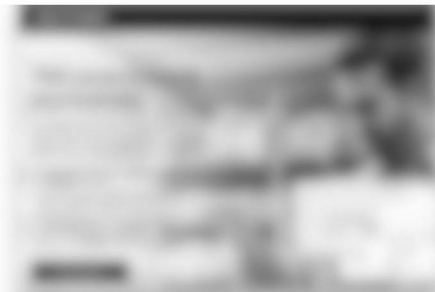
Variant: Showcasing the solutions above the fold increased the visibility and encouraged exploration



Increased Relevance For TMS Terms With New Solution Pages



<https://www.client.com/page/>
623 Organic Clicks YTD
Ranks 5th for "(keyword)" - 1,000 MSV



<https://www.client.com/solutions/page/>
513 Organic Clicks YTD
Ranks 1st for "(keyword)" - 1,000 MSV

What Didn't Work & What Was Left On The Table?

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LinkedIn Struggled To Drive 1Ls

Too Broad of Targeting



In 2023 we invested heavily into LinkedIn, having spent \$513,411.30 since January. Over 55% of our spend was on promotion of TOFU and MOFU content. This resulted in over two million impressions and over 10,000 clicks to potential customers, but we had difficulty converting them down funnel.

This is a main area of opportunity, and shifting the LinkedIn budget allocation to be 70% focused on bottom-of-funnel tactics could help drive traction we've lacked.

Misaligned Messaging



Current Action: Over the last month, we have been rolling out a new campaign structure with improved audience segmentation and refreshed messaging focused on JTBD of our ICP.

Conversion Tracking Roadblock Put New Competitor Landing Pages On Hold

Going into Q3, we saw an opportunity to implement stronger landing pages that speak more directly to how we compare to the other guys. The data from Q2 showed potential if we had a better conversion experience. However, due to a lack of accurate QSU reporting, this led to putting this project on hold until our internal conversion tracking issues were resolved. This is a huge roadblock for the ability to develop and utilize landing pages for any of our campaigns across all efforts.

Account	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12
Account A	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account B	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account C	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account D	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account E	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account F	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account G	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account H	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account I	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Account J	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000

Q2 '23	Competitor
QSUs Form Submission	1
Cost per QSU	\$3,126
CTR	3.86%
QSU Conv. Rate	0.12%
Spend	\$3,126

New Site Launched Below Full SEO Potential

While the new site has been mostly successful in maintaining pre-migration traffic, significant post-launch growth requires execution on more helpful, more functional content. **Here's what is missing:**

- Partner on development and documentation of timelines for content and architecture changes.
- Directive needs a seat at the table for content planning **and** pre-publishing review.
- Boilerplate content won't cut it. Competitors have clarity around their offering—our current copy does not.
- We need aggressive post-launch execution on missing product pages, starting with TMS and (Client) Exchange.
- Confirm final web architecture so that Directive can plan confidently.

Looking Ahead to 2024

Directive

2024 Targets

\$6.6M

(Category) Spend Target



\$500k ENT Budget

ENT Revenue at \$1000 CpQSU



\$300 Target CpQSU for MM

Looking Ahead to 2024



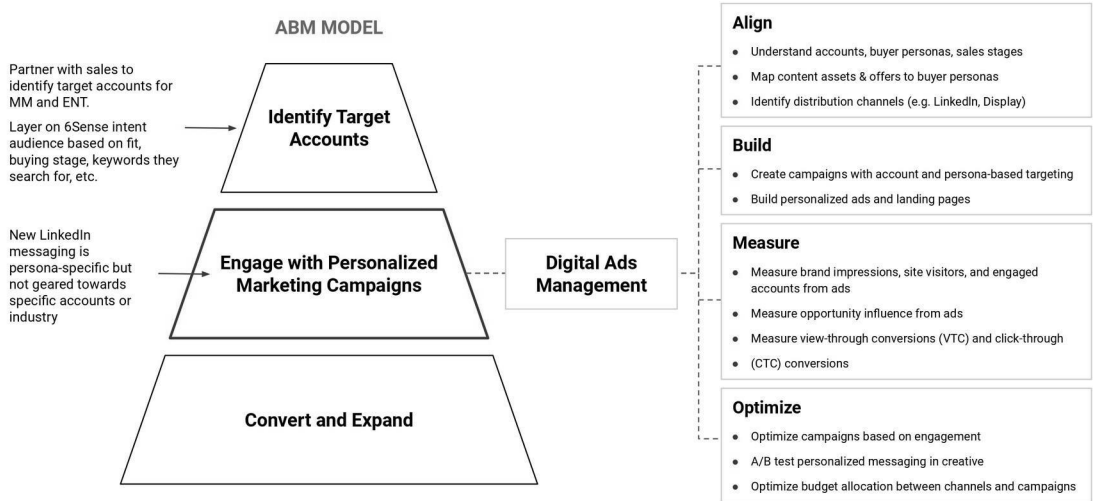
Opportunity to expand our presence on high-intent keywords in SERPS both organically via content and with expansion into third-party review sites. Also, we have two massive competitors on their way out that leaves a lot of room for us to grow in their wake.



New ICP-focused paid social campaigns with tailored messaging aimed at our target MM + ENT accounts. Paired with persona-driven content that addresses the pain-points and how uniquely (Client) solves them.



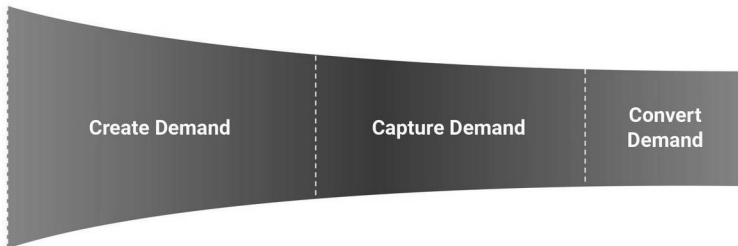
Convert more via an improved user experience with refreshed creative and messaging focused on highlighting the (Client) platform and solutions.



2024 Strategic Opportunities

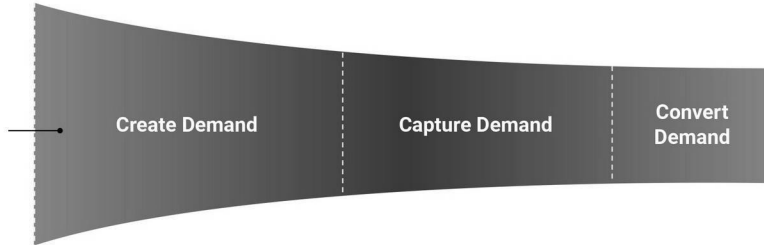
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Objectives & Solutions



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- Leverage LinkedIn Thought-Leader Ads
- Expand into third-party review sites
- Content focused on core product pillars
- Accelerate content production via AI
- Increase TOFU awareness using Meta Ads



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Create Demand

Capture Demand

Convert Demand

- Craft new persona-specific campaigns with tailored messaging
- Launch industry-specific campaigns based on customer data
- Target high-intent BOFU search queries (software, tools, platform)
- Execute on JTBD content
- Scale SEM efforts in Bing (Microsoft) Ads

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- Increase 'freight quote' QSU>Converted Contact CVR
- Revamp landing pages and post-click experience based on user-intent and segmentation.

Create Demand

Directive

Unlock Facebook Advertising with B2B Audience Targeting

We have leveraged historical data and benchmarks from our client library to set initial performance expectations—which will give us indicators for how we could perform within Facebook.

Across our clientele, we typically see Facebook as a far cheaper platform to get in front of our audience and a more cost-effective channel for TOFU promotion.

This is another channel that we can expand into as we look to diversify our ad spend and find different ways to engage with our ICP across all segments.

KPI	Facebook Benchmarks	LinkedIn Q3 Performance
CTR	0.73%	0.66%
Avg. CPC	\$3.07	\$23.45
Avg. Lead	\$106	\$1,144
CVR	2.37%	3.62%

Integrate 6Sense Intent Data With Facebook

Leverage the 6Sense integration with Facebook to sync our high-intent audience segments into the platform layered with Facebook's job title targeting.

This will allow us to better control who sees our ads and craft tailored messaging based on intent signals.

The image shows a screenshot of the Facebook Ads targeting interface. It includes sections for 'Locations' (United States), 'Age' (35-60), and 'Gender' (All, Men, Women). A 'Detailed targeting' section lists job titles: Purchasing manager, Purchasing Officer, Supply Chain Director, Supply Chain Logistics Manager, Supply Chain Manager, and Supply Chain Procurement Manager. Two callouts are present: 'Estimated daily results' showing a reach of 4.2K - 12K, and 'Audience definition' showing an estimated audience size of 14,800 - 17,400.

Locations

Location:

- United States

Age

35 60

Selecting an audience under 18 will limit your targeting options to some locations and age. [Learn more](#)

Gender

☒ All ☐ Men ☐ Women

Detailed targeting

Include people who match ⓘ

- Purchasing manager
- Purchasing Officer
- Supply Chain Director
- Supply Chain Logistics Manager
- Supply Chain Manager
- Supply Chain Procurement Manager

Estimated daily results

Reach ⓘ

4.2K - 12K

Audience definition

Your audience selection is fairly broad.

Specific Broad

Estimated audience size: 14,800 - 17,400 ⓘ

Estimates may vary significantly over time based on your targeting selections and available data.

Leverage Thought-Leader Ads on LinkedIn

(Client's) quarterly market update blog posts consistently rank within the top 10 on Google for queries around "freight market update", "freight trends", "freight forecast".

Having a leader at (Client) post the market update on their LinkedIn feed we can leverage thought-leader ads to amplify the message and create engagement in an organic way.

We'll be able to retarget those users via our bottom-of-funnel campaigns on LinkedIn.



Stop Users In Their Scroll With Visually Engaging Ads

The ads that are currently running look and feel dull compared to the stylized images that are in your library.

There's opportunity to push the boundaries of (Client's) visual style and include new bold imagery and layouts that reflect the new creative direction. We can test these initiatives by refreshing the Fully Case Study and the Quality Service eBook ads on LinkedIn.

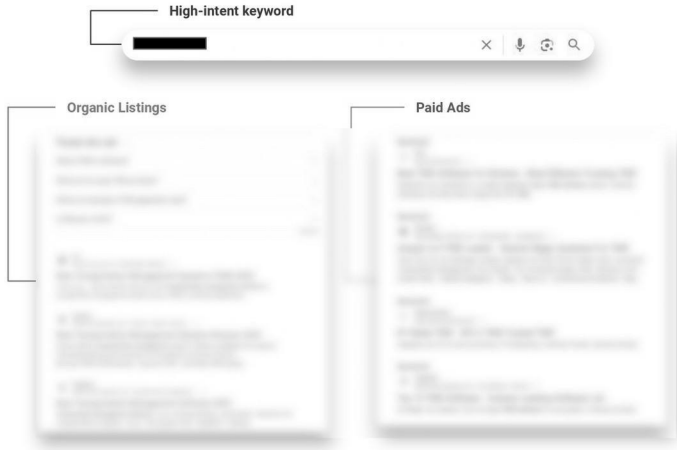


Ads currently running on LI

Maximize Brand Presence By Being Everywhere We Should Be

For most conversion oriented non-brand terms, we have no way of breaking into the top 10 results because the intent of these terms works best for aggregators such as G2 and Capterra.

While we can't grab market share here with our own domain, there is opportunity to work within the top performing aggregators to get a share of that qualified traffic when they're in the evaluation/consideration stage of the funnel.



Leverage AI for Consistent Production

Newly-published content has been effective in driving non-brand and topical relevance.

We want to put our main content focus on JTBD content, e.g. “how to handle supply chain disruptions”, to feed bottom funnel, but we can use AI and other efficiencies such as freelance copy editors to stand this content up quickly.

In our effort to build insulation against branded traffic swings, this is going to be the caulking that fills in the spaces while we develop our JTBD content strategy.



Capture Demand

Directive

Leverage Customer Insights To Fuel Campaign Expansion

Early in our engagement, we enriched your customer data to uncover insights that would allow us to strategically allocate budget and create personalized ad campaigns.

Looking at the enriched data, it's clear (Client) generates significant revenue from the **manufacturing industry**, particularly within the food and beverage sub-industry.

Taking these insights, we can create personalized ad experiences on LinkedIn targeting our exact ICP within these industries.



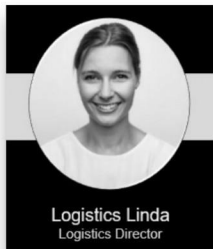
Initial Message

Secondary
Message

Redefine & Better Understand Our ICPs

For better success on LinkedIn, and to ensure we are delivering the right message to the right people, we need to better understand their JTBD and motivations.

By creating tighter audience segmentation based on the buying committees of our target accounts, we'll craft tailored messaging that addresses their challenges and fears, and better position (Client) as the *solution*.



Goal: Achieve efficient and cost-effective logistics solutions for the organization

Values: Service, efficiency, reliability

Challenges: Lack of overall strategy or bandwidth to execute

Fears: Inaccurate reporting data, cost overruns



Win On Third-Party Review Sites

Supply Chain leaders constantly look to gain competitive advantages through efficiency, and that often is with the best software tools available.

Third-party review sites such as Capterra, G2, and Gartner Peer Insights are highly-reputable and currently rank in the top 3 for any search query around 'software', 'solution', and 'platform.' **Users searching for these terms have higher-intent and are more likely to convert.**

Competitors such as (Competitor), (Competitor), and (Competitor) aren't listed on these review sites, which can give us a competitive edge by being there.

[Link to Third-Party Directory Keyword Research](#)

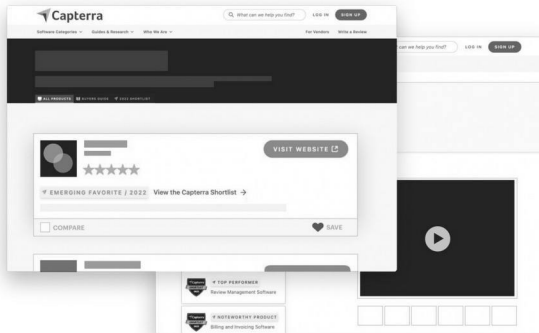


Invest In Capterra's PPC Program to Drive Quality Leads

Capterra is exclusively for B2B software solutions and their paid offering allows us to bid to show higher on a given listing.

Buyers can self-select to connect with us via our landing page (typically with a CTA offering a free trial or demo).

Directive clients who invest in Capterra see an average MQL>SQL rate of 16.58%.



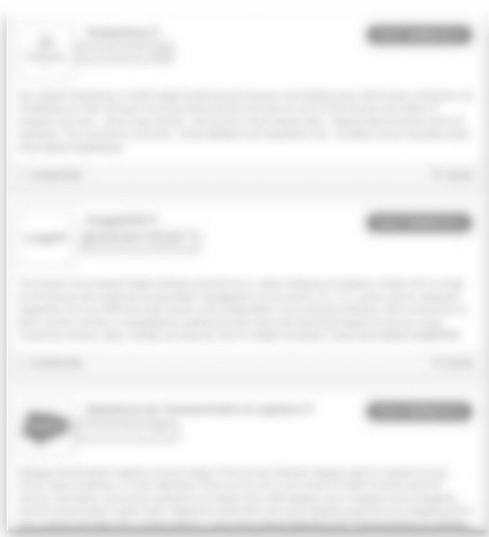
Generate Reviews Leveraging Capterra's Free Review Program

Gartner offers a free incentivized review program as a way to generate reviews of our products.

They offer the following benefits:

- Custom review form that never expires
- A toolkit to help collect reviews
- Gift card incentives to drive action

We can also incorporate the review link in common client touch points, from support to billing.

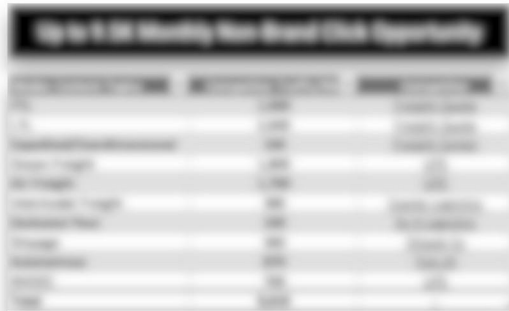


Ensure Maximum Search Reach for Core Offerings

Directive SEO will continue to deliver design, structure, and content creation guidance for the new site as it progresses from phase 1 to phase 2 and beyond. The goal of our work here is to ensure that every core page asset we touch launches with maximum optimization for capturing the greatest share of commercial traffic possible

Proposed New Site Priorities

- Prioritize Creation of Modes Pages
- Implement TMS and Procurement Copy
- Refresh Managed Transportation & Shipper Overview

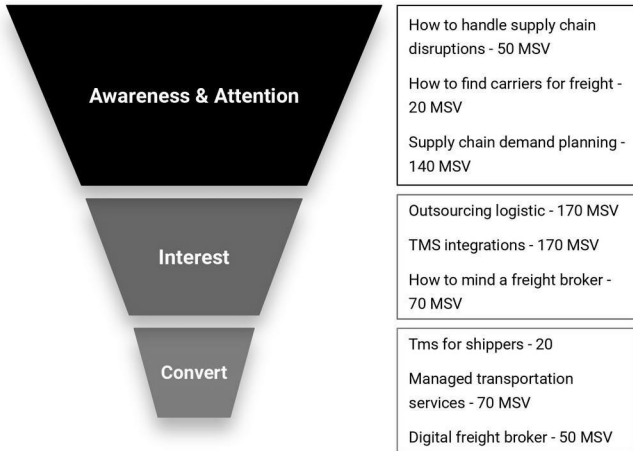


Focus Content Creation On Our ICP's JTBD

We have already taken some solid steps towards building our topical relevance through high funnel blog and glossary content. While this is something we want to continue doing, we want to start addressing BOFU queries to nurture more conversions

JBTD or Jobs-to-Be-Done content focuses on addressing the common pain points our ICPs have and associating those with our offerings as a solution

We already have some topic ideation to work with, but Directive will continue to develop potential topics using (Client's) ICP targeting as a jumping off point



Target High-Intent BOFU B2B Search Queries With Google Ads

Combining getting listed on high-ranking third-party review sites with bidding on these bottom-of-funnel terms via Google Ads and we begin to take up more search real estate across these high-value terms.

Users searching for these BOFU queries generally exhibit higher-intent and therefore more likely to convert.

B2B BOFU Queries

B	C	D	E
Keyword	Volume	Keyword Difficulty	CPC (USD)
tms system	1900	67	12.05
tms software	1900	46	10.5
freight broker software	720	44	19.26
freight management software	480	53	21.33
freight software	480	42	13.57
freight brokerage software	210	41	19.26
tms trucking software	210	39	16.12
best tms software	210	49	16.66
tms software providers	210	49	12.78
tms software logistics	170	59	19.44
best tms systems	140	47	17.82
freight brokering software	140	43	19.26
freight logistics software	140	37	16.75
tms logistics software	140	59	19.44
tms solution	140	51	4.98
tms platform	140	50	12.94
top tms software	110	45	11.95
tms system logistics	70	62	9.92
freight solution	40	29	3.74
freight platform	30	53	3.97

Test Top-Performing Campaigns in Bing Ads

Bing Ads offers a low-cost way for us to diversify our spend and expand into a new channel and our potential reach. We'll start with top-performing Google Ads campaigns to assess viability quickly.

While search volume is lower than Google, it offers much lower CPCs which lowers the risk. It also skews towards business.

The screenshot shows an example of search volume for keywords that we have seen progress to 1L via Google Ads (and includes new TMS software and Freight software keywords).



Potential 18-25 QSUs from Bing Ads using current conversion rate in Google Ads (5%)

Visual Optimizations for New Core Pages

Our product is the **differentiator between us and our competitors**. We are leveraging it by showcasing the product UI on the new core pages to communicate its ease of use and sophisticated capabilities. Customers are more likely to make a purchase when they have a clear understanding of what they are getting.

There is opportunity to expand and bring in simple animation to the UI screens so we draw focus to important elements, add a narrative dimension and stay up-to-date with latest design trends.



Win Over Competitor's Potential Customers

Playing with image and text layers that make the hero section more bold and dynamic.

Test headlines that are result and UVP driven ie.
Save x% more with (Client) or Real-Time Freight Tracking for Peace of Mind.

Leverage 1-star customer reviews of our competitors and pinpoint how users can avoid terrible those experiences with (Client).

Back our claims for happier customers who are meeting their objects with a case study and quantified results.

[View in Figma](#)



Convert Demand

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Even Small Increases in Landing Page Conversion Rate will Compound Growth

Launching net new landing pages and refining our creative will convert more high-intent visitors on page, and contribute significantly towards achieving our goals.

In this model, increasing Click to QSU from 5% to 7.5% (+50%) will scale revenue.

We believe Performance Creative x CRO is the key unlock to achieve this increase due to:

- Our creative experience and case studies, and the current upgrade potential with (Client)
- Calculation is based on an achievable est. CPC and 24K clicks

Ad Budget	\$268,001.00			
Est. CPC	\$11.00			
	Current	Increase By		
Click to QSU	5%	2.5%		
QSU > Converted QSU	24.00%			
Converted QSU > 1st Load	20.00%			
LTV	\$18,986			
	Current	Scenario	Variance	+ / -
QSU	1218	1827	609	50%
Converted QSU	292	439	146	50%
1st Load	58	88	29	50%
Revenue	\$1,110,191	\$1,665,286	\$555,095	50%
ROI	\$842,190	\$1,397,285	\$555,095	66%

Improve QSU > Converted Contact Conversion Rate For 'Freight Quote' Keywords By Matching Search Intent

Between May 2023 to September 2023 we have spent \$62k on search terms that include 'quote' with a healthy conversion rate of 10%.

Keywords with 'quote' have resulted in 304 QSUs. However, only 45 turned into Converted Contacts and only 12 turned into 1Ls (4% QSU-to-1L conversion rate)

Focusing on better matching our ad copy to the landing page and improving the user experience we can expect to improve on our QSU to Converted Contact conversion rate for 'quote' keywords from 15% to 20%.

This would be an additional 15 converted contacts over the same time period.



High % of Competitor Spend Is On 'Freight Quote' Search Terms

We see that competitors such as (Competitor), (Competitor), and (Competitor) have higher percentage of clicks and spend focused on 'freight quote' related keywords.

(Competitor) does the best in tying their ad copy to the landing page experience.



Drive Instant Quotes With Redesigned Landing Page

Competitors are benefiting from automated tools that simplify and speed up the sales process.

We can take advantage of (Client's) Instant Quote tool and create a brand new page to bring visibility to this quick and easy form.

[View in Figma](#)



Current Landing Pages are Missing Key Elements for Optimized Conversions

- ✓ Relevant content offer that aligns with the visitor's needs and interests
- ✓ Minimal navigation to keep visitors focused on the offer
- ✓ Clear, concise and attention-grabbing headline
- ✗ Highlight the benefits of your offer and explain what visitors will gain in a short and concise manner
- ✗ Keep the form short and ask for only essential information. Longer forms can be a barrier for potential leads
- ✗ Include trust signals such as customer testimonials, reviews, ratings, or logos of well-known clients or partners

Avg fold



Capture Top-of-Funnel Traffic by Implementing Best Practices

- ✓ Relevant content offer that aligns with the visitor's needs and interests
- ✓ Minimal navigation to keep visitors focused on the offer
- ✓ Clear, concise and attention-grabbing headline
- ✓ Highlight the benefits of your offer and explain what visitors will gain in a short and concise manner
- ✓ Keep the form short and ask for only essential information. Longer forms can be a barrier for potential leads
- ✓ Include trust signals such as customer testimonials, reviews, ratings, or logos of well-known clients or partners

Avg fold

[View in Figma](#)



Provide User-Friendly Experiences Encouraging Form Submissions

- ✓ Clear headline that immediately communicates the purpose of the page
- ✓ Explain the benefits of connecting with an expert. Highlight what visitors can expect, such as personalized solutions, advice, or guidance.
- ✗ Ask for only essential information to reduce friction and make the process quick and easy.
- ✓ Include trust signals such as reviews, ratings, or logos
- ✓ Ensure the content on the page aligns with the visitor's previous interactions and expectations. It should feel like a logical next step in their journey.

Avg fold

[View in Figma](#)



FY24 Roadmap

Directive

2024 Roadmap

Q4'23	Q1'24	Q2'24	Q3'24
Initiatives <ul style="list-style-type: none">• Restructure and launch new LinkedIn campaigns with persona-specific messaging• Build reviews to expand into Capterra PPC program• Launch new Google Ads campaigns targeting B2B BOFU queries (software, tools, platform)• Complete supporting documentation for new core pages• Execute on outstanding TOFU content initiatives and begin briefing for JTBD content• Support design of new product pages and launch optimized conversion pages	Initiatives <ul style="list-style-type: none">• Launch new LinkedIn campaigns (predictive audiences, updated 6sense audiences, and LAL)• Explore further expansion into new competitor conquering (i.e. FedEx)• Expand into Meta leveraging 6Sense intent audiences + job titles• Expand into Bing Ads• Ongoing content creation for JTBD and high funnel initiatives• Launch Share of SERP initiative• Launch new landing pages to support paid media campaigns	Initiatives <ul style="list-style-type: none">• Launch new landing page test based on performance since initial launch• Audit LinkedIn campaigns and ICPs to expand/refine targeting - test new incentive ads• Revisit content topic research for freshness• Revisit core page content for refresh opportunity and on-page optimizations• Expand into Gartner Peer Insights and/or G2• Upon competitors withdrawal from the internet, launch backlinking initiative	Initiatives <ul style="list-style-type: none">• Explore opportunity to further scale spend in existing channels based on LTV:CAC analysis• Update and repurpose existing content to maintain relevance• Explore new opportunities based on strategy progress (CRO, authority building, etc)• Ask current clients for reviews on Capterra, G2, Gartner paired with incentive ahead of the holidays

FY24 Media Plan

Funnel Stage	Segment	Channel	Platform	Campaign(s)	Yearly Budget	% of Budget
TOFU/MOFU	MM ENT	Social	Facebook (w/6sense Intent)	Video Ads Gated Content Ads	\$100K	2%
TOFU/MOFU	MM ENT	Social	LinkedIn	Thought Leadership Ads Video Ads Gated Content Ads	\$200K	3%
BOFU	MM ENT	Social	Facebook (w/6sense Intent)	Sponsored Content (Demo + Incentive Offer)	\$300K	5%
BOFU	MM ENT	Social	LinkedIn	Convo Ad (Demo + Incentive Offer) Sponsored Content (Demo Offer) ABM Campaigns (Demo/Incentive Offer)	\$900K	13%
BOFU	SMB MM	Search	Google	Brand Non-Brand (incl. BOFU Queries expansion) Competitor	\$4.7M	71%
BOFU	SMB MM	Search	Bing	Brand (import from Google) Non-Brand (import from Google)	\$200K	3%
BOFU	SMB MM ENT	PPC	Capterra	PPC Program (TMS & Freight Software Categories)	\$200K	3%

Pricing for

SEO

(Nov + Dec)

Base Management Fee: \$10,000 per month

- **3 Content Briefs Per Month (6 Total)**
 - **Maximize New Website Potential**
 - **AI-Driven Content + Glossary Expansion**
-

Full Service

(2024)

Base Management Fee: \$53,000 per month

- **Paid Media = \$33,000**
- **SEO = \$10,000**
- **Design = \$10,000**

Pricing & Next Steps

Thank You!

Directive

Appendix

Directive

Q4 North Star Metrics

4,392

Total Paid QSUs

435

Organic QSUs

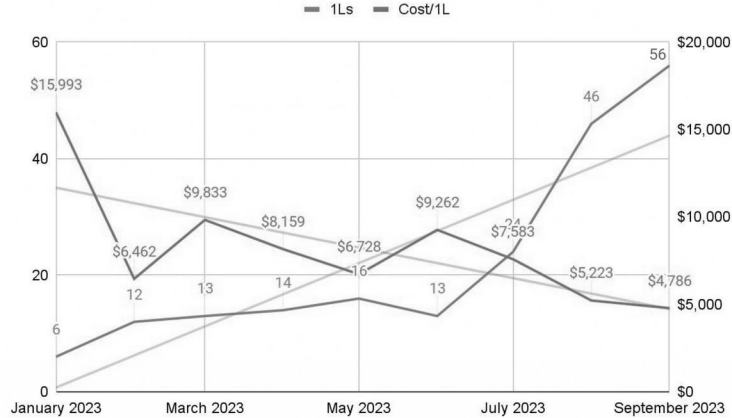
\$272

Target CpQSU for Paid

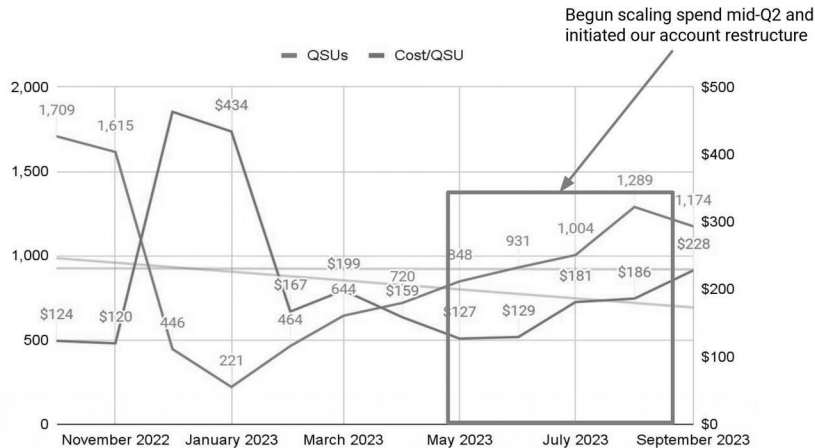
198,552

Organic Sessions

Paid Search 1st Load Performance 2023



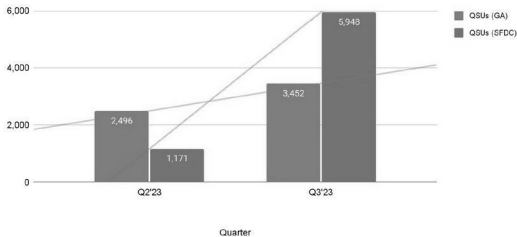
Paid Search QSU Performance 2022-2023



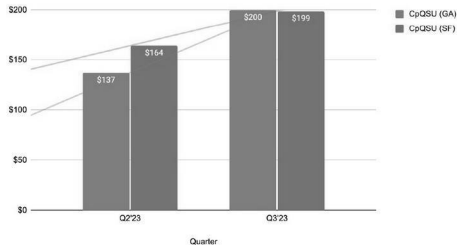
46% QSU Q2 to Q3 Growth from Paid Search

As we've **scaled our spend by 102%** QoQ, this allowed us to maximize our potential to drive more QSUs into the funnel. Our general account optimizations and implementing a new restructure allowed us to stay keen on efficiency.

QoQ QSUs Generated from Paid Search



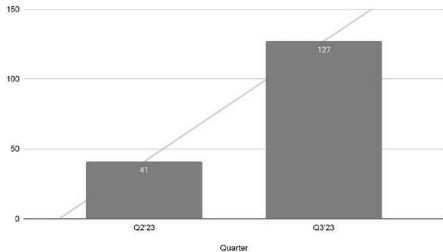
QoQ CpQSU Efficiency from Paid Search



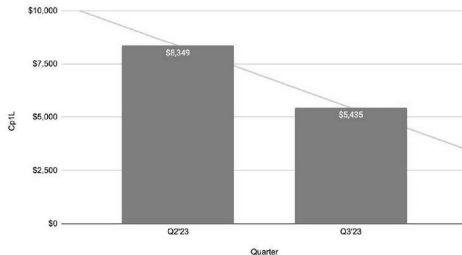
210% 1L Q2 to Q3 Growth from Paid Search

In addition to focusing on QSU growth, we made sure to prioritize our spend for our campaigns and keywords that would make an impact on the bottom line - which we did efficiently at a **35% lower cost**.

QoQ 1st Loads Generated from Paid Search



QoQ Cp1L Efficiency from Paid Search



Design is Lacking Strategic Structure

The current “Connect with an Expert” page can be improved for better UX.

- ✓ Clear headline that immediately communicates the purpose of the page
- ✗ Explain the benefits of connecting with an expert. Highlight what visitors can expect, such as personalized solutions, advice, or guidance.
- ✗ Ask for only essential information to reduce friction and make the process quick and easy.
- ✗ Include trust signals such as reviews, ratings, or logos
- ✗ Ensure the content on the page aligns with the visitor's previous interactions and expectations. It should feel like a logical next step in their journey.

Avg fold



Capterra Performance Compared to All Channels

	Google	LinkedIn	Facebook	Bing	Capterra
	\$101.3M	\$30.3M	\$8.0M	\$7.5M	\$1.7M
Post-Conversion					
CP Lead	461.40	1,101.87	118.89	341.03	1,454.16
CP MQL	936.31	1,430.39	561.05	750.13	2,700.58
CP Opp	6,894.63	26,851.69	8,163.75	10,661.76	15,123.23
CP Customer	23,970.81	80,909.42	59,295.92	48,579.14	37,808.08
Lead > MQL	60.64%	30.22%	23.01%	32.00%	92.16%
MQL > SQL	14.75%	16.03%	6.05%	5.71%	16.58%
SQL > Opp	98.21%	45.24%	100.00%	100.00%	100.00%
Opp > Closed Won	22.22%	30.00%	36.69%	27.27%	36.67%

Select Platform:	Capterra			
	Median	Low Range	High Range	# Clients
CP Lead	1,454.16	1,223.52	1,815.10	6
CP MQL	2,700.58	2,266.92	2,753.77	6
CP Opp	15,123.23	13,002.23	17,961.58	3
CP Customer	37,808.08	37,703.29	50,103.92	3
Lead > MQL	92.16%	53.85%	100.00%	5
MQL > SQL	16.58%	13.06%	18.60%	4
SQL > Opp	100.00%	100.00%	100.00%	3
Opp > Closed Won	36.67%	35.00%	38.33%	2

Freight/Shipping Services

Metrics snapshot - YoY growth - 01/01/2023 - 09/30/2023

	Queries	Imp	Clicks	Ad Depth	
	YoY	YoY	YoY	YoY	Current Range
Mobile	5% ▲	-12% ▼	15% ▲	-15% ▼	2.7
Tablet	-2% ▼	-24% ▼	12% ▲	-21% ▼	2.3
Computer	-8% ▼	-29% ▼	–	-23% ▼	1.9
Overall	-0% ▼	-16% ▼	12% ▲	-16% ▼	2.5

Traffic Appendix



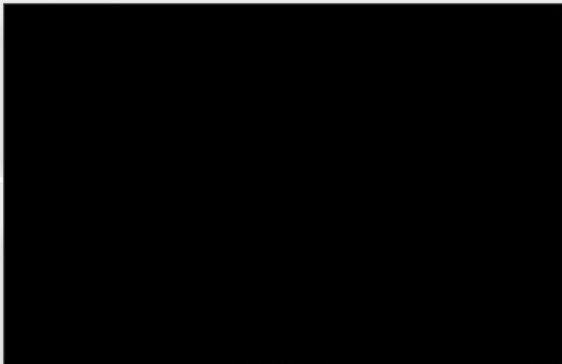
Comparison Period = 5/17 - 9/30 vs 12/31 - 5/16

Data-Driven Optimizations Improve Lead Generation and Establishes Trust

By testing different design elements and layouts, headlines, CTAs, images, and copy, we can identify which combinations provides the best user experience for visitors. We will measure success by looking at conversion rates, bounce rate and time on page.

Testing results in improved lead generation, better customer insights, and gives our users the best experience which helps them perceive us a trusted leader in the space.

Image - lifestyle vs ebook



CTA copy + color

Submit

Submit

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