

A grayscale photograph of an industrial facility, likely a refinery or chemical plant. The image is dominated by a dense network of large, dark pipes that curve and run horizontally across the frame. To the right, there are vertical structures, possibly distillation columns or heat exchangers, with various valves and smaller pipes attached. The background is a clear, light-colored sky. The overall tone is industrial and technical.

# 2021 Planning and Recommendations

REDACTED





# 2020 Results

# KPIs for 2020 (YTD)



## TRAFFIC AND SEO

▲ **176%**

Overall increase  
in site traffic

▲ **624%**

Increase in  
impressions

▲ **246%**

Organic site  
traffic increase

▲ **35%**

Increase in  
top-ranking keywords

▲ **127%**

Increase in "PERI UP"



## BRAND AWARENESS

▲ **185%**

Social Following  
(+1,612 followers)

**101**

Keywords ranking  
top 1-2 pages

**25**

PERI UP keywords



## LEAD GENERATION

**1,444**

Total combined  
lead count

**1,231**

Calls

**213**

Form  
submissions

**398 MQLs**

56% from  
advertising

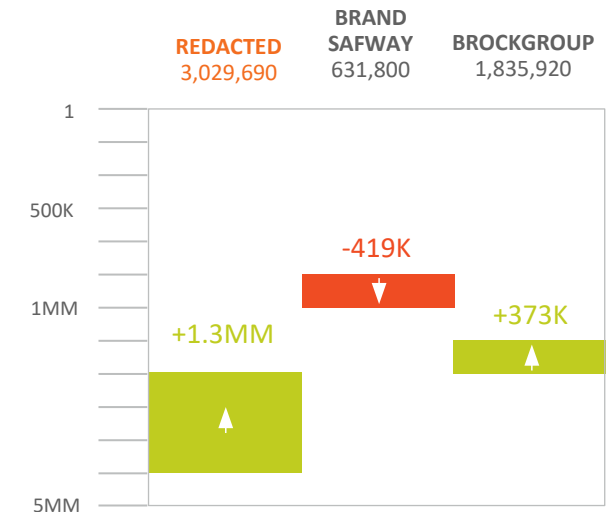
**88 SQLs**

77% from  
advertising



## ALEXA TRAFFIC RANK

Aug. 2020 - Nov. 2020



**Brand Awareness**

Catching up fast

# What Worked Best

## Lead Generation

### Paid Search

- 56% MQLs & 77% SQLs - Achieved lowest cost per qualified lead
- Top conversion rates: Scaffolding campaigns | Specialty Services | PERI UP

## Brand Awareness

### Display Network

- Display ads most important in brand awareness across GDN and programmatic

## Inbound Campaigns

- Industry Newsletter : Total: 35,442 | CTR: 26.9% | Open rate: 7.54%
- PERI and Coatings inbound campaigns
- The Brand Awareness campaigns resulted in most influenced contacts (1 deal ~ \$88,833)

## Organic Site Optimizations

- Top Blogs:
  - [A Look at OSHA Scaffolding Requirements](#)
  - [5 Things to Consider Before You Hire a Coatings Contractor](#)
- Top Downloads:
  - AIMPoint Case Study
  - PERI Case Study

## Highest Interaction Rate

- LinkedIn with 963 interactions (comments, likes, etc.)
- Instagram came in second with 217 interactions.

## Highest Rate of Post Clicks

- LinkedIn with 787 clicks, an average of around 8 per post.

## Highest Rate of Post Shares

- LinkedIn with 140 shares of our posts

## Highest Rate of Post Impressions

- Instagram - 220 impressions (due to hashtags)
- LinkedIn - 51 impressions.



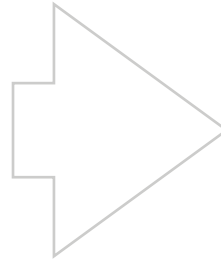


# 2021 Theme & Campaigns

# Branding and 2021 Theme

*Building Trust*

with the Lowest TCO / TPC



- Strengthen brand positioning
- Integrate acquisitions
- Elevate our conversation to the C-suite
- Build on current success



# 2021 Inbound Campaign Summary

Campaigns	Objectives	Premium Content   Hooks
Lower Project Cost	Communicate REDACTED Technology, People & Project Methodology = Lower Total Project Cost	Video   Savings Calculator   Case Study(ies)   Infographic
Webinar - Lower Project Cost	Communicate REDACTED' Technology, People & Project Methodology = Lower Total Project Cost - Case study	Target 3 webinars live   On-demand
Maintenance / Turnaround Services	Create content to capture significant search volume around maintenance keywords and highlight offerings for ongoing maintenance and/or turnaround services	Scaffolding Maintenance Guide   Plant Turnaround Strategy and Tips   Case Study
Tank Coatings / Midstream	Expand on existing content and create new content highlighting REDACTED' technology and unique value proposition to capture and nurture leads	Which Coating Is Right for Your Application? 10 Questions to Ask A Comparison of Common Industrial Coatings Case study on time and costs saved with REDACTED tank coating services
Existing Campaign Expansion	Expand existing campaigns and focus on more in depth / decision level content	



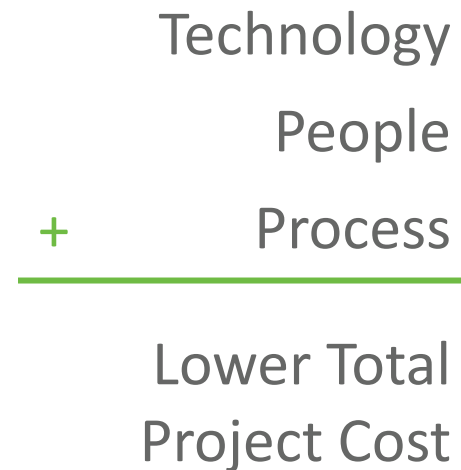
# Campaign Elements

## Premium Content / Hooks

- Savings calculator with PERI UP & REDACTED technology
- Infographic with data showing cost savings
- Thought leadership/opinion piece from Exec Team on industry
- Webinar
- Video with testimonial
- Scaffolding maintenance guide
- Plant turnaround strategy & tips
- Understanding the Different Types of Coatings
- Which Coating Is Right for Your Application? 10 Questions to Ask
- Comparison of Common Industrial Coatings
- Scaffolding Parts List
- Comparison of PERI UP scaffolding and other types of scaffolding (Cuplock, etc.)

## Case Studies with Data

- Cost savings (PERI UP and other services)
- Maintenance / turnaround services
- Tank coatings
- Storm preparation / hurricane scaffolding
- Around one of the apps with client testimonials



INBOUND CAMPAIGN DETAILS

Lower Project Cost

CAMPAIGN OVERVIEW	OBJECTIVES / KPIS	TARGET COMPANIES (SIC, NAICS)	PERSONAS	LOCATION
Technology + People + Process = Lower Total Project Cost	Awareness; Lead gen; Move leads through sales pipe; Get invited to RFP	GC/EPCs, Pharma, Construction, Pulp & Paper, Downstream Energy, Petrochem, PowerGen	C-Suite, Procurement Mgr, Operations Mgr, Plant Mgr, Turnaround Mgr, Maintenance Mgr, Project Mgr (GC/EPCs)	US with focus on industrial rough belt and southern states
MESSAGING THEMES	PREMIUM CONTENT			
•Superior technology •Trust in REDACTED expertise, experience, safety •Technology & process efficiency that leads to costs efficiency	Awareness	Consideration		Case Study
	<b>Video</b> Focus on trust & lower total project cost Includes testimonials from existing client(s)	<b>Savings Calculator</b> Cost savings calculator for scaffolding using PERI UP & REDACTED		<b>Case Study(ies)</b> In-depth case study with data on savings
		<b>Infographic</b> Data showing cost savings		
PROMOTION				
Email	Advertising	Social		Blog
•Promotional emails featuring premium content and related blogs •Workflows	Per advertising plan	Social posts that promote case studies, calculator and infographic		How to save with dustless blasting services (or abrasive blasting services)

INBOUND CAMPAIGN DETAILS

Webinar - Lower Project Cost

LIVE & ON-DEMAND	OBJECTIVES / KPIS	TARGET COMPANIES (SIC, NAICS)	PERSONAS	LOCATION
<ul style="list-style-type: none"><li>•1st webinar to be live</li><li>•Same webinar to be offered every 3 months - Core content recorded + live 15 min Q&amp;A</li></ul>	Awareness; Webinar registration	GC/EPCs, Pharma, Construction, Pulp & Paper, Downstream Energy, Petrochem, PowerGen	C-Suite, Procurement Mgr, Operations Mgr, Plant Mgr, Turnaround Mgr, Maintenance Mgr, Project Mgr (GC/EPCs)	US with focus on industrial rough belt and southern states
WEBINAR PRESENTATION ELEMENTS				
Topic Definition	Presentation	Form for Questions	Blog Recap	Supplemental Content
Topics to be defined with REDACTED executive team.	<ul style="list-style-type: none"><li>•All content will drive the prospects to this conversion landing page</li><li>•A landing pages to be developed for each persona</li></ul>	Form where attendees can submit their questions beforehand. This fosters engagement and increases the likelihood of attendance.	Post webinar blog recap	Post webinar supplemental content to engage attendees and move them further down sales pipeline
CAMPAIGN ACTIVITIES				
Landing pages: webinar registration	Social	Email	Advertising	
<ul style="list-style-type: none"><li>•All content will drive the prospects to this conversion landing page</li><li>•A landing pages to be developed for each persona</li></ul>	Social media outreach to drive our audience to specific webinar registration landing pages.	Series of emails to educate & nurture prospects: <ul style="list-style-type: none"><li>•Webinar invitation (persona specific)</li><li>•Reminder emails</li><li>•Post webinar “Thank You” email</li><li>•Follow up email to registrants with link to recorded webinar</li><li>•Enlist them in workflow</li></ul>	Per advertising plan	



INBOUND CAMPAIGN DETAILS

Maintenance / Turnaround Services

CAMPAIGN OVERVIEW	OBJECTIVES / KPIS	TARGET COMPANIES (SIC, NAICS)	PERSONAS	LOCATION
Create content to capture significant search volume around maintenance keywords and to highlight REDACTED’ offerings for ongoing maintenance and/or turnaround services	Awareness; Lead gen; Move leads through sales pipe; Get invited to RFP	Pharma, Construction, Pulp & Paper, Downstream Energy, Petrochem, PowerGen, (GC/EPCs)	Turnaround Mgr, Maintenance Mgr, C-Suite, Procurement Mgr, Operations Mgr, Plant Mgr,, Project Mgr (GC/EPCs)	US with focus on industrial rough belt and southern states
CORE & PREMIUM CONTENT				
Website - New page	Awareness	Consideration	Decision	
Industrial Maintenance Services page  (Keywords: industrial service and maintenance, industrial maintenance services, industrial maintenance service providers, industrial maintenance painting services, industrial maintenance and repair services, industrial maintenance solutions, industrial turnaround services)	Scaffolding Maintenance Guide	Plant Turnaround Strategy and Tips	Case study showing how much a company can save with REDACTED maintenance/turnaround services	
PROMOTION				
Email	Advertising	Social	Blog	
•Promotional emails featuring premium content and related blogs •Workflows	Per advertising plan	Regular promotion of existing/new content	• Scaffolding Maintenance Guide • Creating a Plant Turnaround Strategy • How to Have a Successful Plant Turnaround	

INBOUND CAMPAIGN DETAILS

Tank Coatings / Midstream

CAMPAIGN OVERVIEW	OBJECTIVES / KPIS	TARGET COMPANIES (SIC, NAICS)	PERSONAS	LOCATION
Expand on existing content and create new content highlighting REDACTED’ technology and unique value proposition to capture and nurture leads	Awareness; Lead gen; Move leads through sales pipe; Get invited to RFP	GC/EPCs, Pharma, Construction, Pulp & Paper, Downstream Energy, Petrochem, PowerGen	C-Suite, Procurement Mgr, Operations Mgr, Plant Mgr, Turnaround Mgr, Maintenance Mgr, Project Mgr (GC/EPCs)	US with focus on industrial rough belt and southern states
PREMIUM CONTENT				
Awareness	Consideration		Decision	
Understanding the Different Types of Coatings (ungated for SEO)	Which Coating Is Right for Your Application? 10 Questions to Ask		Case study on time and costs saved with REDACTED tank coating services	
	A Comparison of Common Industrial Coatings			
PROMOTION				
Email	Advertising	Social		Blog
•Promotional emails featuring premium content and related blogs •Workflows	Per advertising plan	Social posts promoting blogs and premium content		•What Are Industrial Coatings and Their Applications? •Custom Industrial Coating Solutions

INBOUND CAMPAIGN DETAILS

Existing Campaign Expansion

CAMPAIGN OVERVIEW	OBJECTIVES / KPIS	TARGET COMPANIES (SIC, NAICS)	PERSONAS	LOCATION
Expand existing campaigns and focus on more in depth / decision level content	Awareness; Lead gen; Move leads through sales pipe; Get invited to RFP	GC/EPCs, Pharma, Construction, Pulp & Paper, Downstream Energy, Petrochem, PowerGen	C-Suite, Procurement Mgr, Operations Mgr, Plant Mgr, Turnaround Mgr, Maintenance Mgr, Project Mgr (GC/EPCs)	US with focus on industrial rough belt and southern states
CORE & PREMIUM CONTENT				
Website - New pages	Awareness	Consideration	Case Study	
Dedicated fireproofing page (Sample: <a href="https://brandsafway.com/fireproofing-services">https://brandsafway.com/fireproofing-services</a> )	Scaffolding Parts List	Comparison of PERI UP scaffolding and other types of scaffolding (Cuplock, etc.)	Case study on how much a company saved with REDACTED services	
Dedicated lead abatement services page (Sample: http://www.brace.com/our-services/abatement/)				
PROMOTION				
Email	Advertising	Social	Blog	
•Promotional emails featuring premium content and related blogs •Workflows	Per advertising plan	Social posts promoting blogs and premium content	Blog topics to support SEO for specific keywords	





# General Brand Awareness Activities





## SEO - 2021 PRIORITIES

- Sitewide content audit and retooling of on-page keyword optimizations
- Technical site optimizations to ensure full preparation for Core Web Vitals rollout in May 2021
- Expanded optimization efforts focused on SEO for images and video and local
- Expanded application of rich markup

# SEO

## Research and prep of content audit, followed by implementation of audit recommendations

- PERI & general scaffolding remain areas of organic focus, along with industrial maintenance and coatings
- Additional emphasis on multimedia SEO in our content audit and recommendations (e.g., video transcripts and image keyword optimization)

## Technical SEO and page speed

- Emphasis on Core Web Vitals
- Leverage new media formats to reduce aggregate page size
- CDN & load accelerators

## Expand local SEO efforts through GMB & MOZ Local

- Develop regular cadence for posting blogs, and image or video posts to location-specific GMB profile

## Backlink development

- Seek out co-branded content opportunities to expand REDACTED brand affinity while encouraging backlink development

## Rich SERP Presence

- Rich answers
- Knowledge graph
- Rich snippets (structured data)
- YouTube featured snippets



# PPC Advertising

Continue prioritization and campaign optimizations for ad channels that currently work best:

## 1. Paid Search

- Where CPA and lead quality have consistently been the most attractive

## 2. Programmatic

- Where cost/impression and brand awareness efforts were most effective

## 3. Paid Social

(LinkedIn & Facebook)

- Paid social has fueled major YTD growth to the REDACTED social following, serving the interests of brand awareness and thought leadership

## Growth Areas for 2021

### 1. Improve segmentation and depth of target audience lists

- Centralize campaign themes and messaging
- Google Display → StackAdapt
- Leverage sequential advertising

### 2. Increase brand engagement with more attention-grabbing ads

- 2021 Theme
- Expand use of video promotions (6s/15s/30s)
- When no video, use interactive ad formats

### 3. Maximize ad budget to increase Return on Ad Spend (ROAS)

- Additional steps to limit impact of ad fraud
- Reduce ad fatigue with regular refresh of creatives

# Social Media Management

## ORGANIC

- Producing and sharing thought leadership
- Engagement with industry topics (news & events)
- Utilizing video creative for stories and posts (PERI UP and more)

- Encourage further engagement on social posts from internal stakeholders (Smarp)
- Explore new gen social media bots to help automate aspects of engagement

## PAID

- LinkedIn Ads
  - Sponsoring of select organic posts
  - Paid promotion of premium content
  - Lead generation forms
  - Remarketing & Occupational Targeting
  - Official event pages: webinars & live events
- Facebook/Instagram Ads
  - Sponsoring of select organic posts
  - Paid promotion of premium content
  - Remarketing
  - Official event pages: Webinars & Potential live events

# Social Media Engagement Campaigns

## Tactics to boost engagement with routine organic social posting

- FAQ answering
- Highlight people at REDACTED -- team photos, an employee success story, community involvement
- Showcase completed projects and photos
- Coordinate stronger employee post engagement (e.g., likes/comments/shares)
- Identify public opportunities to offer subject matter expertise in relevant groups on LinkedIn

### Toothpick Scaffolding Competition

- Participants are tasked with building a model scaffolding structure with toothpicks and marshmallows; they must record a video with a brief description of the engineering handiwork, then upload and post to a defined social network using an official campaign hashtag
- HexaGroup and REDACTED can shortlist top submissions, then turn those over to a public vote on social.

# Social Responsibility / ESG

A fast-growing brand awareness metric

## Why?

- RFI & RFP Requirement
- Great for social media
- Bolster company's image
- Boost employee satisfaction
- Improved recruitment

## What?

- Corporate policies protecting the environment/ESG
- Charitable giving
- Community involvement







# Website & Collateral Enhancements



IMAGES OF  
PREVIOUS WEBSITE  
REDACTED

# Website

## User Interface

- Redesign homepage
- Feature videos more prominently and visually.
- Implement mega menu with CTA
- Make click-to-call CTA more prominent
- Add more photography
- Make social media links more prominent

IMAGES OF  
PROPSOED  
WEBSITE REDACTED

# Website

## New functionality

- Resource center: search / filter to easily find resources (case studies, ebooks, ...)
- Utilize pop-up forms
- Chatbot with live chat

## New pages

- Industrial Maintenance Services
- Fireproofing
- Lead abatement services
- ESG
- Talent Management

# Marketing Collateral

## Videos

- Corporate Update
- Video Case Study
- Technology

Corporate brochure update with associated line sheets

IMAGES OF  
MARKETING  
COLLATERAL  
REDACTED

A low-angle, upward-looking photograph of a complex industrial structure, likely a refinery or chemical plant. The image is dominated by a dense network of large, silver, insulated pipes that curve and twist in various directions. These pipes are supported by a dark, heavy metal framework. To the right, a vertical structure with a yellow-painted upper section and a perforated metal lower section is visible. The background is a clear, bright blue sky. The overall composition conveys a sense of scale and industrial complexity.

# Sales Support & ABM

Sales & Marketing Alignment



# Improving Sales Presentations

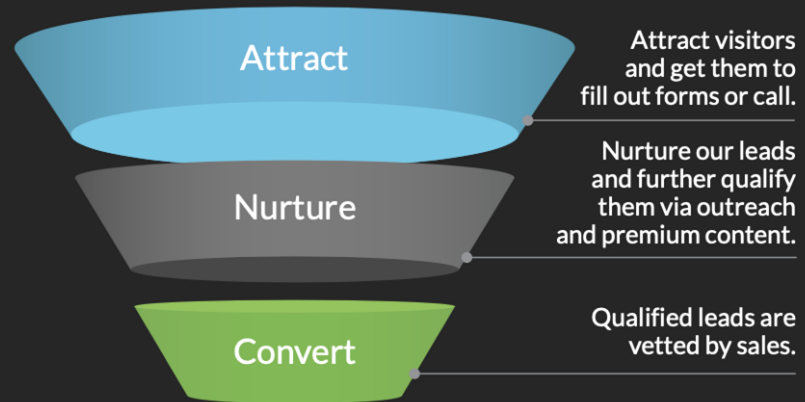
Increase Reach

- Sales Presentations
- Proposals / RFI
- Technology - XaitPorter

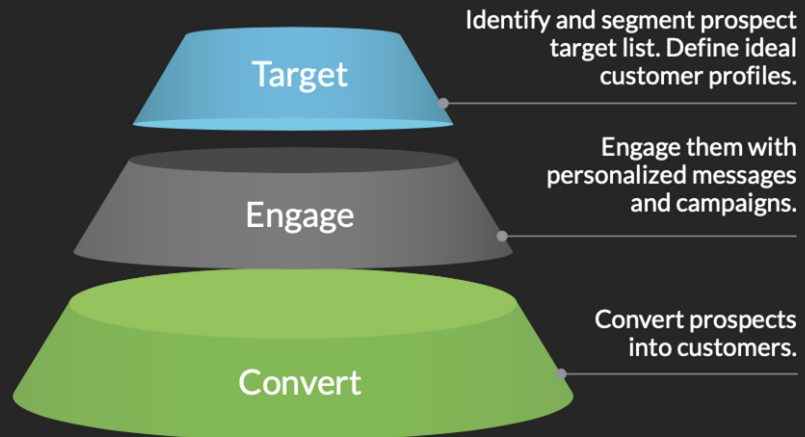




## INBOUND MARKETING



## ACCOUNT-BASED MARKETING



# What is ABM?

Account Based Marketing (ABM)  
is a go-to-market strategy that  
coordinates personalized  
marketing and sales efforts to  
land and expand target accounts.

## **Go-to-Market Strategy**

A fundamental business strategy to drive revenue, not a simple campaign or tactic.

## **Personalized**

Built on account insights, content and messages for maximum relevance and resonance.

## **Marketing *and* Sales**

Led by Marketing in close collaboration with Sales.

## **Target Accounts**

Focus more resources on the most valuable accounts.

## **Land and Expand**

Driving business at new accounts, and expanding within existing accounts.

Agro | Pharma | Construction | Pulp & Paper | ...

## What do salespeople want from account-based marketing?

“I want qualified meetings with key decision makers who understand why they’re meeting with me.”

“I want to engage everyone who matters at the account, not just my champion.”

“When I call new accounts, I want them to know who we are and what we do.”

# ABM Methodology

## STRATEGY



### Market Segmentation

Ideal Customer Profile (ICP) & Core Offerings.



### Target Account List



### Account List Tiering

Establish Tier 1 and Tier 2 Accounts

## DEVELOPMENT



### Campaign Development

Set-up ISR Alias  
Creative development  
HubSpot Set-up for ABM



### Outreach Strategy

Develop Playbook:  
messaging (email, social),  
cadences, media and  
channels.



### Account Mapping

Research contacts within each  
target company  
Import data into CRM and map  
according to tiers.

## EXECUTION



### Campaign Execution

Monthly execution



### Measurement & Optimization

Measure, refine and  
expand



### Nurturing

Marketing keeps OdySea top of  
mind with ongoing nurturing.

# Creative Requirements

## Campaign elements

- Emails with associated collaterals
- LinkedIn personal messages
- Scripts
- Ads
- Landing Pages
- Sequences
- Email signature



Sales Playbook

## Messaging

- Elevating the message for bigger opportunities
- Address industry/company specific information
- “Edgy” first touch presentation
- Deeper case studies
- Video testimonials

Technology

People

+

Process

---

Lower Total  
Project Cost



# Account List Tiering

## STRATEGIC

Perfect ICP fit - High strategic value - Up to 25 Companies (Industry, region, size, persona/job titles)

- Account planning
- Named stakeholders in each persona group
- Personalized communications (email, LinkedIn)
- Personalized experiences - HubSpot landing pages
- Personalized events - meeting, lunch and learn
- Personalized sales collateral
- Special tracking in HubSpot (tier 1)
- More data, more often
- Direct Mail

## SCALE

Strong ICP fit - Lower lifetime value - up to 150 companies (Industry, region, size, persona/job titles)

- Lite account plan based on segmentation
- Named stakeholders in some persona groups
- Generic communications (email, LinkedIn)
- Generic events - meeting, lunch and learn
- Targeted ads + expansion (look alike model)
- Special tracking in HubSpot (tier 2)

## PROGRAMMATIC

Fit some ICP criteria

- Part of Inbound marketing campaigns

# Customer Marketing

- Addressing Upselling and Cross Selling Opportunities
  - Thorough research of counterparts in other locations: Who | Understand Existing Relationships | Getting them acquainted with REDACTED
  - Nurture existing clients – Include them within the REDACTED family: Internal/Custom Newsletter | Lunch and Learn/Webinar | Increase Touchpoints with AM -> WoM strategy
  - Elevate the conversation at the corporate level - From Csuite to Csuite (finance, operations) & Procurement: Custom Presentations | Direct Mail

# Direct Mail



When **sales** and **marketing align**, your company **optimizes** their marketing and sales cycles, resulting in **reduced costs** and an increase in growth. Sales and marketing alignment can lead to a **32% increase** in year-over-year (YoY) revenue growth (Aberdeen Group).



# Sales and Marketing Alignment - The End Goal

## Company Goals

What are the company's major goals, pertaining to sales and marketing, for the quarter, half of year, or year? This can include soft goals, such as "become a leading authority online in our industry," and hard goals, such as "sell 100,000 units."

1. [GOAL #1]
2. [GOAL #2]
3. [GOAL #3]

## Opportunity Handoff

This is the section where you'll outline:

- a. What determines a qualified lead in the eyes of sales and marketing.
- b. How many of these marketing will be responsible for generating.
- c. How sales will respond to these leads.

## Marketing Goals

*Outline the Marketing team's goals as they pertain to sales. These goals should be specific so all parties understand how the goal is measured. Examples include traffic, subscriber, lead, MQL and SQL numbers, ad impressions, or number of collateral pieces created.*

1. [GOAL #1]
2. [GOAL #2]
3. [GOAL #3]

## MQL and SQL Criteria

At REDACTED, a MQL is defined as a lead that...

- [CRITERIA 1]
- [CRITERIA 2]
- [CRITERIA 3]

At REDACTED, a SQL is defined as a lead that...

- [CRITERIA 1]
- [CRITERIA 2]

## Sales Goals

*Outline the Sales team's goals as they pertain to marketing. These should include close rates of leads and contacts generated from marketing so that the team understands the impact of their work. Overall deal and revenue goals can be specified as well.*

1. [GOAL #1]
2. [GOAL #2]
3. [GOAL #3]

## Marketing's Responsibility

Marketing is responsible for generating [MQL NUMBER] of these MQLs. Sales will be alerted of new MQLs by [METHOD].

## Sales' Responsibility

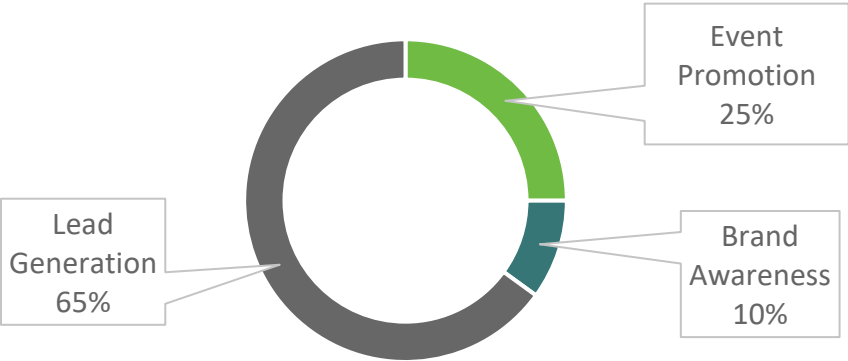
Sales is responsible for determining the workability of MQLs and reaching out to them within [TIME FRAME] of handoff.



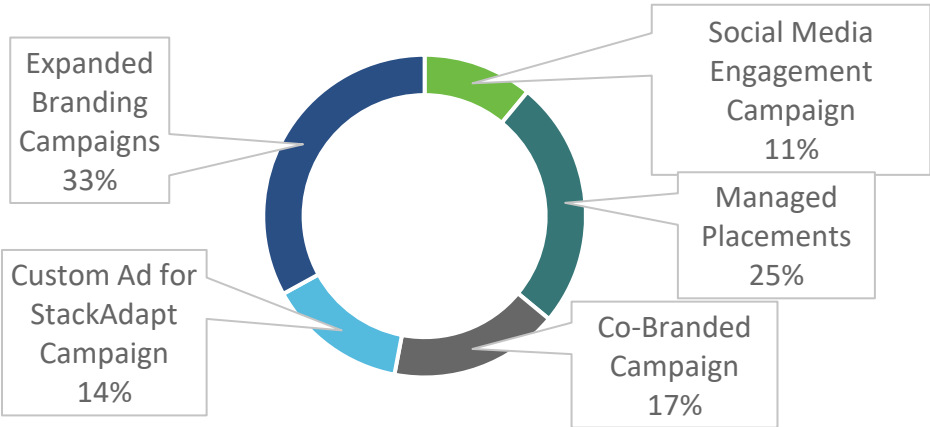
# Advertising Budget

# 2021 Digital Ad Budget Recommendations

Proposed Allocation of Core Budget



Proposed Allocation of Stretch Budget



## Brand Awareness Campaigns Core Ad Budget

Ad Platform	Est. Budget Share
StackAdapt	50%
LinkedIn	25%
Facebook	15%
Google Ads*	10%

## Lead Generation Campaigns Core Ad Budget

Ad Platform	Est. Budget Share
Google/Bing*	65%
LinkedIn**	20%
StackAdapt	15%

\*Combination of YouTube & Discovery Ads

\*Paid Search Ads    \*\* Lead Gen Forms

## Branding & Lead Gen Campaigns Stretch Ad Budget

- Managed placements (direct & CTV)
- Co-branded native sponsored content
- Custom interactive ads via StackAdapt (can be associated with only 1 campaign)
- Expanded Brand Awareness Push (increased \$\$\$ for paid social, display & sequential remarketing campaigns)
- Sponsoring of UGC/organic posts related to social media engagement campaign



# Diversification Objectives – Organic Growth

Brand / Message	Content	Advertising	Outreach
<b>Deliver Lower Total Installed Cost</b>	Website is not energy centric	Expand reach to new industries across programmatic and social channels	ABM campaign on non energy specific projects (IIR)
<b>Building Trust</b>	Overall imagery is becoming more conceptual (illustrative)		ABM specific brand awareness campaign across a selection of ICPs
<b>Technology</b>	Expand content on industry specific pages.		
	Build industry specific landing pages for project/industry types		
	Though leadership content (blog/social) around new industries		
	Case Studies		

## Questions

- Is being a market leader in energy type project beneficial to other industries? (Critical Infrastructure)
- Are there specific technologies or skill sets to acquire to be competitive in new industries



# CRM Process – Inbound Leads

Incoming Form or Phone Call	Lead is Assigned to a Sales Rep	Lead is Handled by a Sales Rep	A Deal is Created	A Deal is Closed
<ul style="list-style-type: none"><li>• Lindsey reviews, assigns or disqualifies prospects</li><li>• Lead Qualification – 1<sup>st</sup> step = Yes or No</li><li>• Lead Status = In Progress or Unqualified</li><li>• Lifecycle Stage<ul style="list-style-type: none"><li>• MQL if assigned to a Sales Rep</li><li>• Lead if not to be assigned yet.</li></ul></li><li>• Update other fields if necessary</li></ul>	<ul style="list-style-type: none"><li>• Contact Owner = Sales Rep</li><li>• Lifecycle Stage = MQL</li><li>• Create a task = Follow Up in 3 business days, reminder the day of</li></ul>	<ul style="list-style-type: none"><li>• Sales Rep follows up by favored channel (email, phone)</li><li>• Sales Rep ensures communication is logged and a follow up is always scheduled</li><li>• Lead Status:<ul style="list-style-type: none"><li>• in progress → not yet connection</li><li>• Connected → Connection has been made → Lead is being handled by sales rep and also nurtured by REDACTED marketing.</li><li>• Unqualified -&gt; Lead is disqualified</li><li>• Bad Timing → Lead is put on a nurturing workflow</li></ul></li><li>• Lifecycle Stage<ul style="list-style-type: none"><li>• When positive connection has been made, lifecycle stage elevated to SQL</li><li>• For other connections lifecycle stage moved to Lead</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Deal Stage - TBD based on established sales cycle</li><li>• Lifecycle stage updated to Opportunity</li><li>• Lead Status: Connected</li><li>• Sales rep to continue follow up process until deal closing</li></ul>	<ul style="list-style-type: none"><li>• Closed Win<ul style="list-style-type: none"><li>• Lifecycle Stage – Customer</li></ul></li><li>• Closed Lost<ul style="list-style-type: none"><li>• Lifecycle Stage updated to SQL</li></ul></li></ul>

- All Sales Reps on Hubspot with Training
- Monthly Review by Lindsay and Lee for follow up workflows
- Monthly removal of unqualified leads