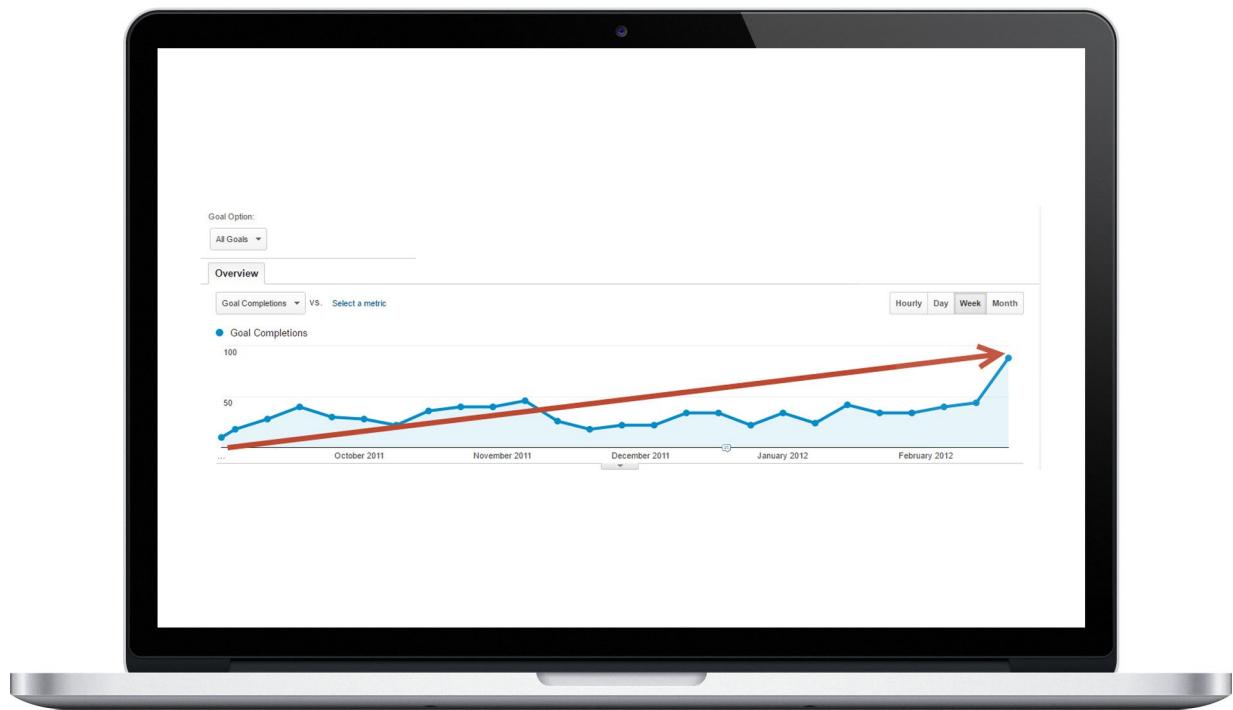




Presents:

Consulting Firm Becomes A Digital Marketing Fanatic

A digital marketing case study



The Company

Confidential

Type

Niche Consulting - B2B

Case Study Content

Marketing Strategy

SEO/Content Marketing

PPC Marketing

Marketing Automation & Lead

Nurture

Reputation Management

Conversion Rate Optimization

Introduction

This retrospective tells the story of how we took one client from zero-to-hero on the web and turned a skeptical, traditional consulting firm into a dyed-in-the-wool digital marketing believer...

The client was a niche consulting firm that offered specialty financial services to companies and corporations. Unlike other similar firms in their space (i.e. the “Big Five” accounting firms), this client focused solely in one niche service. And as any savvy marketer knows, the riches are in the niches... so we knew this client had tons of potential.

A very forward thinking and ambitious executive went to bat for us because he saw the potential returns that digital marketing could bring. We landed the account and went straight to work.

The challenge

Our client was starting from ground zero. Besides a basic website, the client had practically ZERO presence on the web.

And in an old-school industry like financial services, business is usually won through building relationships, (i.e. making cold calls, shaking hands, playing golf and drinking copious amounts of alcohol.)

So in order to prove our worth, we had two hurdles to overcome:

1. **Can we demonstrate progress?** Our client was old school and didn’t really care about clicks or keywords. We needed to prove that digital could add dollars to the bottom line, and that more investment could lead to an even bigger payday.
2. **Can we get the C-Suite jazzed up about it?** In other words, the execs needed to literally see results, whether that meant dollars in the bank or a keyword ranking on page 1 of Google.

In short, we had to move the needle fast to prove our worth. And that meant making the charts sing and cash registers ring.

Year 1 - Proof of concept (\$150K in revenue)

We quickly realized there was one area where our client had a clear opportunity to crush their competitors: SEO.

First, we built out a rich database of the nichey keywords that our client’s customers were searching on. A quick analysis revealed that almost none of our competitors were optimizing their websites for these keywords...

Jackpot!

Our executive champion at the firm told us our efforts were paying off. We still remember the email to this day...

“Direct hit!”

he wrote us, as he posted a highly-qualified lead that came straight from SEO.

So we went through the main pages of the site and optimized them for those “easy-to-win” keywords with high buying intent.

Within just a couple of months, our client’s rankings for their target keywords increased dramatically. Perhaps more importantly, they wound up ranking highly for one of their most important keywords.

Best of all, our executive champion at the firm told us our efforts were paying off. We still remember the email to this day... “Direct hit!” he wrote us, as he posted a highly-qualified lead that came straight from SEO.

The C-levels at the company were now starting to perk their ears up a bit. So (with their blessing) we began to kick things into high gear.

Ramping up content for traffic wins

After the initial SEO work was done, we still had a ton of keywords we wanted to target. But we didn’t have any content to use to target these keywords.

Here’s the good news: Our client was committed to creating great content and had tons of existing stuff we could repurpose. (Protip: The choice to create awesome content is what separates winners from losers on the web.)

The bad news? We had no place to put content on the website! So we bolted on a WordPress blog to our client’s DotNetNuke-based site and we were off to the races.

Because the laws surrounding our client’s service area were different in each state, it was important that our blog content covered issues unique to each of the different states.

Our client was already sending “legislative alerts” to its clients via email, so republishing these on the new blog was a no-brainer. So we worked with the client to create publishing schedules with content topics that followed this strategic formula:

| Site Add | Keyword | Google Volume | Yahoo V | Bing V | Phrase | SEO Comp | Title Comp | URL Comp | Search: Title | AdWords CPO | Main Category | Sub-Cat | Sub-Cat | Daddy | Juice | Targeted SEO |
|------------|------------------------------|---------------|---------|--------|--------|----------|------------|----------|---------------|-------------|---------------|-------------|-------------|-------------|-------|--------------|
| 11/19/2011 | unclaimed funds | 2400 | 600 | 1300 | 30 | 5 | 5 | t .95% | \$0.98 | Laws/Rules | Big Daddy | Small Daddy | Small Daddy | Juicy | X | |
| 11/19/2011 | unclaimed money | 1600 | 400 | 590 | 33 | 5 | 2 | 3.22% | \$0.54 | Laws/Rules | Big Daddy | Small Daddy | Small Daddy | Juicy | X | |
| 11/19/2011 | unclaimed property | 480 | 205 | 390 | 27 | 2 | 1 | 3.72% | \$1.78 | Laws/Rules | Big Daddy | Small Daddy | Small Daddy | Juicy | X | |
| 11/19/2011 | unclaimed tax | 320 | 137 | 260 | 15 | 2 | 1 | 3.27% | \$0.00 | Laws/Rules | Big Daddy | Small Daddy | Small Daddy | Juicy | X | |
| 11/19/2011 | unclaimed tax - 1000 | 720 | 309 | 210 | 0 | 0 | 0 | 0.00% | \$0.56 | Laws/Rules | Geo-based | — | Super Juicy | — | X | |
| 11/19/2011 | unclaimed taxes | 140 | 35 | 210 | 7 | 1 | 1 | 1.95% | \$1.64 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed taxes - 1000 | 700 | 111 | 170 | 7 | 0 | 0 | 7.95% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed proceeds | 110 | 27 | 91 | 13 | 0 | 0 | 7.14% | \$1.89 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 10000 | 170 | 42 | 91 | 34 | 1 | 1 | 19.23% | \$1.65 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 100000 | 140 | 35 | 91 | 2 | 0 | 0 | t 10% | \$0.07 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 1000000 | 110 | 27 | 73 | 7 | 0 | 0 | 4.75% | \$1.57 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 10000000 | 320 | 137 | 48 | 3 | 0 | 0 | 3.23% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 100000000 | 91 | 23 | 46 | 3 | 1 | 1 | 18.48% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 1000000000 | 28 | 19 | 36 | 1 | 0 | 0 | 1.09% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 10000000000 | 58 | 15 | 36 | 5 | 0 | 0 | 2.78% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | GOOG Suggested | 720 | 309 | 36 | 1 | 1 | 1 | 1.79% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |
| 11/19/2011 | unclaimed tax - 100000000000 | 16 | 7 | 0 | 2 | 0 | 0 | 0.00% | \$0.00 | Laws/Rules | Geo-based | — | Big Daddy | Small Daddy | X | |



NEW YORK TO EMAIL UNCLAIMED PROPERTY HOLDER NOTIFICATIONS
 Published: December 13th, 2012
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Unclaimed property holder notifications from New York will now be sent to holders via email, after a change in policy by the Office of Unclaimed Funds (OUF). Kiplinger has learned that the OUF recently sent out postcards notifying holders of annual unclaimed property holder notifications.

The Magic Formula

NEW REGULATION IMPACTS DELAWARE UNCLAIMED PROPERTY EXAMINATION GUIDELINES

Published: December 11th, 2012

Delaware unclaimed property examination guidelines will be slightly modified, as the Department of Finance passed a new regulation effective December 10, 2012. This new regulation amends an existing regulation addressing unclaimed property audits, specifically the periods of time that the State Escheator will examine historical records to determine compliance with Delaware unclaimed property law.

MONTANA PROPOSES UNCLAIMED LIFE INSURANCE BENEFITS LAW

Published: December 4th, 2012

Montana is the latest state to propose an Unclaimed Life Insurance Benefits Law, as Bill D 375 was filed on November 23, 2012. This bill, introduced by the Montana Economic Affairs Interim Committee at the request of the State Auditor, is consistent with the NCOL Model Act and would mandate that

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A YEAR OF UNCOMPROMISING PERFORMANCE



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“Issue” + “Geography” = Easy Niche Traffic

After just 6 months of following this formula, the new blog was generating the same amount of traffic as the main site!

Transitioning to conversion & lead nurture

All the extra traffic was nice, but there was one problem... we had no mechanisms on the blog to convert those visitors into leads!

We quickly realized we needed to accomplish two things:

1. Transition blogging responsibilities to our client so we could focus our efforts in the area of greatest impact (i.e. conversion.)
2. Begin implementing conversion mechanisms to start generating leads from the blog.

So we first sat down with our client's marketing team and trained them on the exact process we were using to crank out blog posts that were attracting traffic like a magnet. Step by step, we were turning our client's marketers from digital novices into online marketing badasses.

Once our client's marketers were confidently handling the blog, we began building calls-to-action that would drive blog visitors to webinar signups, whitepapers and other offers designed to collect email addresses.

How we jerry-rigged marketing automation

As we began to collect more emails from the blog, we also worked on figuring out how to turn these email leads into sales opportunities for our client.

At the time, our client was using MailChimp for their email marketing but were only sending out mass email blasts to their list. They didn't have any marketing automation tools set up to nurture leads and make sure sales opportunities didn't fall through the cracks.

To fix this, we used MailChimp's "sequences" feature to build out automated workflows based on which offer converted the prospect into a lead. Leads would automatically get enrolled in a specific sequence based on which form they completed on the website.

While this system lacked all the nice features of a HubSpot or Marketo, it allowed us to get results for a fraction of the cost as we continued to prove ROI to our client.

"Closing the Loop" the old school way

Proving ROI was no easy task—our client didn't have a CRM and was tracking all their leads manually on a spreadsheet.

So in the early days, we had to put a lot of heavy lifting into manually combing through lead records and asking our client "Is this a good lead? Why/why not?"



But it paid off—over months of running this process, we learned intimately what did and did not constitute a high-quality lead for our client. This knowledge would serve us well over the years to come when it came time for us to ramp up digital even harder.

It also showed the client that, frankly, we gave a damn about their success. And we could show them exactly how much money we made them—and it was more than enough.

Total Year 1 revenues: \$150,000

So they signed on for a second year! It was a no-brainer.

Year 2 - Next level sh*t (\$415K in revenue)

Our second year with the client brought a whole new set of challenges and opportunities. Having won the confidence of the C-suite, we were given a small raise and tasked with keeping the momentum going.

Problem was, there was one big, ugly obstacle standing in our way of making that happen...

How we pulled off a risky website redesign

Our client's main website (which was built on DotNetNuke) was starting to become problematic. Not only was it challenging to use the platform to run marketing campaigns, but the platform version itself was also outdated. Not to mention, the website's look and feel desperately needed a refresh.

In short, their website sucked. And before we could do anything else, we needed to make it not suck. Moving the website to a new CMS was the obvious choice, but we had to be careful.

We had gained a ton of ground in website rankings in the previous year. One misstep in how we transitioned our website's SEO could obliterate all of our hard work. (WARNING: We've seen this happen to businesses all too often... we call it the "Redesign Slap." It can annihilate at least 50% of your traffic and leads, literally overnight.)

So we went to work carefully redesigning the website with SEO in mind. Specifically, we mapped out the content architecture on the old site and focused on making as close a 1:1 transition as possible. That meant changing as few URLs as possible and keeping the same page titles from the old site, then "301" redirecting pages from the old site to their exact relative on the new site.

Then we launched and watched our traffic carefully... success! We didn't lose any organic traffic over the next several months. In fact, traffic just kept growing with the launch of our new site.

With a new, attractive and highly-usable website in our hands, we set to work building a new marketing channel that would turn out to be highly profitable for us...

How to make money using AdWords (without losing the shirt off your back!)

With organic search rankings gradually increasing over time, launching a pay-per-click campaign was the next logical step to accelerate our client's lead flow.

But Google AdWords ain't cheap—target the wrong keywords in the wrong way and Google can drink your money dry without returning a cent. And our client didn't exactly have millions of dollars to burn, so the campaigns needed to generate returns real quick.

Fortunately for us, we were already armed with tons of "back-pocket" data that would make building winning campaigns a cinch...

Thanks to getting the tracking tight on our client's website, we were able to pinpoint the specific keywords that were driving leads and sales opportunities from SEO.

So we didn't have to "guess" and spend thousands of dollars to figure out which keywords would work in our campaigns... because we already knew the "moneymakers" we needed to target in our campaigns.

And even better news... because our client was so niche, there were almost no competitors advertising on their keywords. That meant AdWords CPCs were just a few bucks a click. When you factor in that our client's average deal size

Sign In ▶

BEFORE

The screenshot shows a dark blue header with navigation links: Home, Services, Communication, Home, and Home. Below the header is a large grey box containing text about the company's services and a testimonial. A red banner at the bottom features a list of services and a call-to-action button. To the right, there's a sidebar with a newsletter sign-up form and a resources section.

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was recently rated #1 in Group 5's 2011 Shareholder Services Industry Satisfaction Report (Read More...)

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RESOURCES

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AFTER

The screenshot shows a modern website design with a dark blue header featuring a search bar and navigation links: Home, About, Services, Resources, News & Events, Contact Us, and Enter Your Search Here... ▶. The main content area has a large image of two business people in suits. On the left, there's a testimonial and a list of services. On the right, there's a prominent callout for being ranked #1 for 2 years in a row, along with social media links and a newsletter sign-up form.

Lean on is the most accomplished, knowledgeable, and responsive unclaimed property communication, compliance & consulting firm in the country.

is the number one provider of unclaimed property communications, compliance and consulting services in the country. From customized communication programs and data analysis to in-depth unclaimed property services, state unclaimed property reporting, escheat consulting and annual compliance reporting, provides corporations, mutual funds, banks, brokerage, insurance companies and transfer agents with a depth and breadth of services that is unmatched.

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- Client Education & Training

helps clients reduce costs, protect shareholders, or retain customers while successfully navigating the complexities of unclaimed property regulations.

#1 GROUP 5 RATING 2 YEARS IN A ROW

RANKED #1 IN HIGHEST SATISFACTION FOR ASSET RECOVERY SERVICES

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was in the tens of thousands of dollars, our AdWords approach made a heck of a lot of sense.

Thanks to a successful redesign and a profitable new marketing channel, our client nearly tripled their money from the web.

Total Year 2 revenues: \$415,000

Year 3 - Scaling up our efforts (\$1.5M in revenue)

We had proven the ROI of digital to the C-suite beyond a shadow of a doubt, and they were ready to ramp things up. So we received a substantial budget increase and we were off to the races.

Moving to a modern, robust marketing automation platform

Our jerry-rigged MailChimp platform was no longer sufficient. We needed a modern platform to handle the volume and complexity of our expanding marketing efforts.

After evaluating a few different systems, it was clear HubSpot had the right features at the right price point.

By itself, HubSpot is just a tool. So we needed to set HubSpot up to serve the client's marketing goals, not the other way around.

Here's how we did that:

1. We asked, "Who are our target buyers?" What industries are they in? What are the different types of buyers? What are their common concerns and informational needs? And so on.

2. What existing content do we have? How do these relate to our target personas? What content gaps exist?

3. How does our content map to stages in the sales cycle? Does the person submitting XYZ website form need additional nurturing or are they ready to pass to the sales team? What additional content is do we need to add to get our leads to the point of sales-readiness?



We then built out the workflows in the HubSpot platform. These included 5-6 automated emails per workflow which were targeted to specific personas and content offers.

With our new system in place, we had an engine that would make sure no website lead slipped through the cracks.

Taking revenue attribution into the 21st century

It was time to move our client away from tracking their sales on spreadsheets and get them onto a CRM. This would help our client's sales team easily track and manage all their sales opportunities. But even more importantly, it would allow us to see exactly how much revenue our efforts were adding to the bottom line.

Our client selected Salesforce and we went to work hooking it up to the website in 3 steps:

1. Web-to-lead w/ custom fields: We customized our client's Salesforce with custom fields that we could use to pass data into from the website and HubSpot. Next, we connected the forms on our client's website to Salesforce so the lead data would pass directly into custom fields.

2. Analytics integration: This was pretty cool... We captured and parsed "UTM" data from our client's Google Analytics instance to see first and last touch attribution. That meant we could track not only which channel originally drove a lead, but also see which marketing channels helped convert that lead into an opportunity. (Sweet!)

| | | | | | | | |
|------------|---|-----------------|----------|----------------------------|------------------------|----------|---------------------|
| 10/22/2013 | 1 | google | cpc | lost life insurance fin... | google | cpc | lost life insura... |
| 10/22/2013 | 1 | google | organic | (not provided) | google | organic | (not provided) |
| 10/21/2013 | 1 | (direct) | (none) | | (direct) | (none) | |
| 10/21/2013 | 1 | cvent.com | referral | | cvent.com | referral | |
| 10/21/2013 | 1 | google | cpc | | google | cpc | |
| 10/21/2013 | 2 | google | organic | | google | organic | |
| 10/21/2013 | 4 | unclaimed-pr... | referral | | unclaimed-property.... | referral | |
| 10/21/2013 | 2 | google | organic | (not provided) | google | organic | (not provided) |
| 10/21/2013 | 3 | google | organic | (not provided) | google | organic | (not provided) |
| 10/21/2013 | 1 | bing | organic | unclaimed prop... | bing | organic | unclaimed pro... |
| 10/21/2013 | 1 | unclaimed-pr... | referral | | unclaimed-property.... | referral | |
| 10/21/2013 | 1 | google | organic | (not provided) | google | organic | (not provided) |

3. HubSpot integration: We also connected HubSpot and Salesforce so changes from either platform would auto-magically show up in the other. This made data management a cinch.

Finally, we created custom CRM dashboards so our client could see revenue by traffic source/medium (i.e. Bing organic, Google organic, Bing paid, email, etc.)

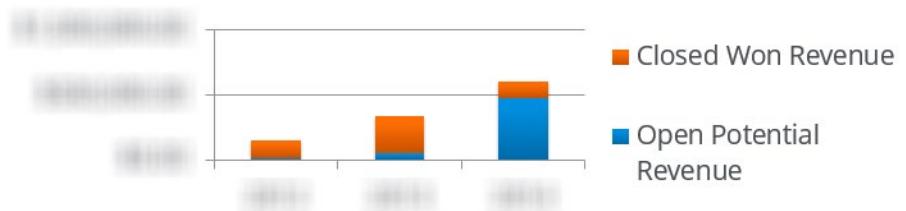
Our client now had a fully-customized, badass marketing automation and attribution machine in place. So we were ready to start cranking up the lead volume to the Nth degree.

We could now start implementing some of our "secret" and advanced tactics in the realms of backlink and authority development, conversion rate maximization, lead nurturing, reputation management and more.

And it all paid off in spades...

Total Year 3 revenues: \$1,500,000

Customers, Revenue & Pipeline



Conclusion

The client still works with us to this day. Every year for the past 6 years, we've continued to see gains in traffic and leads. Not to mention, you'd have a hard time searching on Google for the services they offer and not seeing their site pop up on the first page.

Perhaps best of all, we've seen our main point of contact in marketing win several promotions and go from an online marketing newbie to a total boss. He now manages a team of in-house marketers that speak fluent "digital geek."

We continue to expand every year... and life is good.

"Top 8 Most Costly Compliance Mistakes" (Free Unclaimed Property Whitepaper)



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By Debbie L. Zimoff, Chief Compliance Officer, Axial

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