

BUILDOUREMPIRE

**CleverINVESTOR**

MARKETING OVERVIEW

# FAIL FAST

DATA, ANALYTICS AND METRICS

# KLIPFOLIO TODAY

MONEY OUT / ACTIVITIES

MONEY IN / RESULTS

## Total Ad Cost

How much was spent on Search & Display Network ads vs. the total budget for all campaigns over the last 7 days?



## New Wins by Channel



## Leads This Month

## Leads (Today)

77



## Leads (This Month)

2,310



## Web Users (This Month)

155,446



## Key Metrics

\$775.5K

... total revenue MTD, compared to \$1,095.0K last month.

\$14.17

... avg revenue per lead, compared to \$15.00 last month.

## Funnel

Metric	On Target	Past 30 Days
Visits	64%	775,539
Site Events	51%	100,200
Leads	70%	54,750
Opportunities	29%	5,010
Wins	35%	2,491

## Campaign Performance

Campaign	ROI	Leads	Wins	Start
81/09 Email Blast	18.45%	1,214	2	Thu, Apr 01, 2010
Blue Team Video	8.73%	325	42	Mon, May 10, 2010
Red Team Skyscraper	11.05%	235	58	Wed, May 12, 2010
Red Team Banner	33.88%	512	121	Sun, Apr 04, 2010
		2,286		

## Traffic Sources (past 60 days)



## Revenue Per Sale

\$6,100.00

Last Month: \$5,806.00

## Cost Per Sale

\$127.00

Last Month: \$156.00

## Key Web Metrics



171:1 Visitor to Lead Ratio

Visitors

▲ 850,681



Site Events

▼ 20,493



Leads

▲ 5,325



## Conversions

How well did all campaigns do in achieving the desired actions over the last 7 days?

## Conversion Rate

1.34%

Previous Period: 1.31%

2.14% ▲

## Total Conv. Value

0

Previous Period: 0

0.00% —

## Key Rates

How did your clickthrough rate, cost-per-click, and cost-per-conversion for all campaigns compare to your targets over the last 7 days?

## Clickthrough Rate

1.43%

Target: 0.74%

## Cost-per-Click

0.13

Target: 0.22

## Cost-per-Conversion

10.93

Target: 0.00



5:1 Lead to Win Ratio

New Wins

▲ 736



New Bookings

▲ 175,980



Retention

▼ 87.5%



## ROI

Were conversion values greater than ad costs for all campaigns over the last 7 days?

## ROI

-100.00%

100.00% ▲

## ROI Value

-3,247

100.00% ▲

# RECOMMENDATIONS

## Top down decisions and adjustments

Our highest-ROI decisions will often flow from offers, messages and target segments—not simply “pass/fail” assessments of specific programs or tactics. You can always evolve your mix of tactics, but even the best tactics applied to the wrong strategies won’t produce a fraction of your desired results.

## It's impossible to run a race without a finish line. Start with the outcome.

It's essential to plan our programs with ROI in mind from the outset. When you quantify the outcome you expect from each marketing investment, you can then determine exactly how you will measure the program against those goals and position yourself to achieve them. We need to measure ROI to find not just what works, but what works better. We need to focus on “improving ROI,” not just “proving ROI.” Only with discipline, planning, and a closed-loop process, you will be able to improve your marketing ROI.

## Standardize KPIs, Metrics & Analytics

What does success look like? What metrics are most important for each activity? It's important that everyone agrees on what the funnel looks like, what we're tracking, where we're tracking it and what's the point of truth for those metrics? Data alignment assures we are making marketing decisions that aren't subjective and we fill any missing data.

This means we must measure things not just because they are measurable—but because they will guide us towards the decisions we need to make to improve company profitability.

## Standardize Tracking

UTM codes will give us a wealth of data around ad, campaign and source performance. Right now there's no standardized method, tool or formatting.

## Define and align the revenue cycle

The first step in revenue cycle analytics is to define the stages of the revenue cycle, starting with potential buyer awareness and moving through marketing and sales to close business and beyond. Marketing and sales collaborate to formally define each stage and the business rules that determine a prospect's movement from one stage to the next.

# RECOMMENDATIONS

## Be data driven

We need to know our customer's lifetime value overall and also their lifetime value per product, churn or attrition rates. These numbers will help give us a better understanding of how much we're willing to pay for a lead or LTV:CAC. The best rule of thumb is spending 40% or less than customer's lifetime value.

A SaaS company has a gross margin of 75% and monthly customer churn of 2%, and each customer spent an average of \$40 with you every month, the calculation would look like this:

$$75\% \times (1 / 2\%) \times \$40 = \$1,500 \text{ LTV}$$

## Think outside the funnel

Beyond metrics related to marketing, we need metrics, KPIs and goals for sales, products and customers. We can use that data to inform us on whether to pursue new initiatives, what outcomes to predict and what to focus our efforts on.

- » Shift the mix from many small deals to fewer larger deals (or the reverse).
- » Build out market presence for a specific segment of the product portfolio.
- » Increase revenue per customer.
- » Increase products per customer.
- » Increase average customer lifetime value.
- » Increase customer retention.
- » Optimize a high-performing geography.
- » Improve customer experience.

	Facebook	Youtube	Paid Search	Email	Nurture
<b>IMPRESSIONS</b>	2,000,000	2,000,000	100,000	100,000.00	9,373
<b>CTR</b>	1.50%	1.50%	2.00%	2.00%	2.00%
<b>OPEN RATE</b>				15.00%	15.00%
<b>LP CONV. RATE</b>	3.00%	3.00%	3.50%	3.50%	3.50%
<b>PRODUCT PRICE</b>	\$12,000.00	\$12,000	\$12,000	\$12,000	\$12,000
<b>CPM</b>	\$25.00	\$25.00			
<b>CPC</b>			\$5.50		
<b>TOTALS</b>					
Clicks	30,000	30,000	2,000	300	187
Conversions / MQLs	900	900	70	11	7
Spend	\$50,000.00	\$50,000.00	\$11,000.00	\$0.00	\$0.00
ROAS	\$2.16	\$2.16	\$0.76		
Acquisitions	9	9	0.7	0.105	0.06561183551
Gross Revenue	\$108,000.00	\$108,000.00	\$8,400.00	\$1,260.00	\$787.34
<b>Controls</b>	<b>Sales Close %</b>	<b>Profit Margin %</b>	<b>Avg Aux Sale</b>	<b>Aux Sale %</b>	<b>Abandon %</b>
	1.00%	75.00%	\$937	10.00%	15%
<b>Total Impressions</b>	<b>4,200,000</b>				
<b>Total Clicks</b>	<b>62,487</b>				
<b>Total Conversions / MQLs</b>	<b>1,887</b>				
<b>Total Acquisitions</b>	<b>19</b>				
<b>Spend</b>	<b>\$111,000.00</b>				
<b>CPL</b>	<b>\$58.82</b>				
<b>ROAS / NROAS</b>	<b>\$3.63</b>	<b>\$3.17</b>			
<b>Aux / Cross sell</b>	<b>\$176,817.63</b>				
<b>Gross Revenue</b>	<b>\$403,264.97</b>				
<b>Net Revenue</b>	<b>\$351,811.96</b>				

A man with glasses and a dark jacket is standing in front of a whiteboard, gesturing with his hands. The whiteboard has the text 'BUILD YOUR EMPIRE' and some handwritten notes like 'BIZ', 'BIZ EXP.', and 'I CHECK'. In the foreground, the silhouettes of audience members are visible.

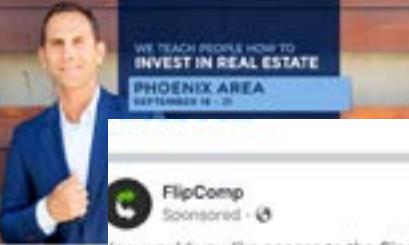
BUILD YOUR EMPIRE

# THE CLEVER BRAND

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WE TEACH PEOPLE HOW TO INVEST IN REAL ESTATE  
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LEARN THE 5 THINGS  
We WISH We KNEW BEFORE We STARTED Wholesaling Real Estate...  
Wholesaling houses is one of the fastest and easiest ways for starting Real Estate Investment to get started in Real Estate. But it's not a lot of confidence about what Wholesaling Real Estate is and why it may be the best way to make money in Real Estate today. To this from people, we share the 5 things we wish we knew before we started Wholesaling Real Estate.  
But we learned these 5 things a few years ago, we would have done MANY more deals, own even more properties, and made MUCH more money ever sooner!

Wholesaling Inc. has been featured on...  
FOX 10, ABC, CBS, NBC, BUSINESS INSIDER

Our 3 Step Framework Buy Right / Manage Right / Finance Right

  
This Free Webinar Reveals:  
✓ First framework that allowed a pizza guy and a drug rep to purchase over 40,000 units in only 5 years, create a \$400,000,000 portfolio with their own money, and retire from their jobs in less than three years  
✓ Our 3 Step Framework, Buy Right, Manage Right, Finance Right  
✓ The strategies that are being employed in today's current market that will bring you success and move you closer to your goals  
✓ A Step By Step Game Plan For You To Get Started In Multi Family Apartments

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"Broke Teen Rises From Homelessness To \$527 Million In Real Estate Deals"

Now, He's Giving Away A FREE Real Estate Investing Book Which Reveals His Genius Secret...

From The Desk of Rick Moreno, CEO HIS Capital Orlando, Florida May 2019

Dear Future Real Estate Star,

Reading this short page could turn out to be the most worthwhile investment you've ever made...

...For far, far more than just your finances.

In fact, by the time you finish this true story, I believe things could turn around for you and your family permanently. And you could even leave an impact on a small part of the world.



Sound Impossible?

  
KeyGlee

CASE STUDY: REAL ESTATE INVESTOR JOSIAH GRIMES

LEARN HOW HE SCALED KEYGLEE TO 1-2 WHOLESALE DEALS PER DAY

How to Become

ATTENTION: If you've dreamt of making money in real estate OR if you own a real estate business but haven't gotten serious about scaling your challenge is for you...

From the desk of: Cody Sperber  
Re: The 30 Day Deal Challenge

Please excuse the direct language I use on this page. It's blunt, it's important to communicate that this is a challenge. This challenge is going to be a lot of fun. That said, we're not playing around here.

Contrary to what late-night infomercials want you to believe, real estate isn't easy. You'd be rich already if it was. Unfortunately, you need to do more than just "click a button" and have money fall from the sky.

At the end of the day, no matter how simple it is, to flip a house with no money down, and no matter how much help our team gives you, there is only one person who's going to make this happen... YOU.

GET OFF THE SIDELINES AND GET IN THE GAME

Let me ask you a serious question...

What if our team were to give you everything you need... all the training, all the tools, all the support you need to close a no-money-down real estate deal in the next 30 days...

but I still didn't have the DEALS or MONEY to show for it

How to Flip a House in 4 Days for Huge Profits... Without Using Money or Fixing It!

And How To Copy This Strategy In Less Than 10 Minutes!

Register My Spot Now!

Kent Clothier  
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No, this is NOT just another "how to" book on Real Estate investing.  
... Continue Reading

  
TODAY NBC NEWS FOX NEWS ABC NEWS SIRIUS

you checked out my book... Continue Reading

  
FREEBIE REVERSE WHOLESALING

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38 17 Comments 8 Shares



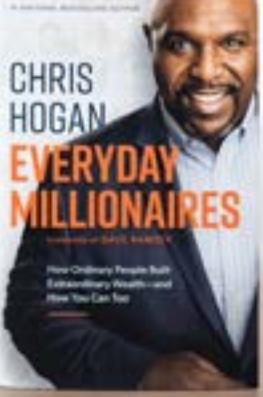
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"How To Start An Online Business While Traveling The World...Even Without Any Business Experience"



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 ✓ How to find the RIGHT buyers, from day 1, in 100+ per month.  
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OUR MISSION

To Elevate the  
Financial Well-Being of  
Humanity

The purpose of a business is to solve a problem. The problem we saw was that there was no financial education in our school system, globally. We took on the task of bringing real financial education to people throughout the world.

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delivered.[Learn More](#)Welcome To The Or  
Flipping Real Estate Inv

Complete and Affordable House Flipping  
Training Program  
at a fraction of the cost of other comparable  
courses of success. 100% Satisfaction  
Guaranteed.

complete system bundled  
together at a fraction of the  
cost of other comparable  
courses of success.

Full Masters Education

Unlimited Monthly Leads

Access

For One

100% Money

Guaranteed

Results

100% Satisfaction

Guaranteed

Results

100% Satisfaction&lt;/div





# RECOMMENDATIONS

## Brand reboot

Clever needs to stand out to cut through the noise. The market is full of low end pretenders. Every Joe Nobody is creating a video saying they have experience flipping houses and can teach prospects how. We want to remove ourselves from the crowd who are advertising the same manner with the same message.

I suggest we reboot the brand as a company/community clarifying the infrastructure, technology and expertise of the company. We form a tribe and pull prospects, leads and customers into our brand. "Want to be a Clever Investor? Hey Clever Investors." Vs "Hey it's Cody the Clever Investor".

## Throw Rocks @ our enemies

Our job as experts and leaders is to help bring people to higher ground. To move them from where they are to where they want to be. To create distance from the bottom feeders and clutter we need to throw rocks them, calling out differences between us and them.

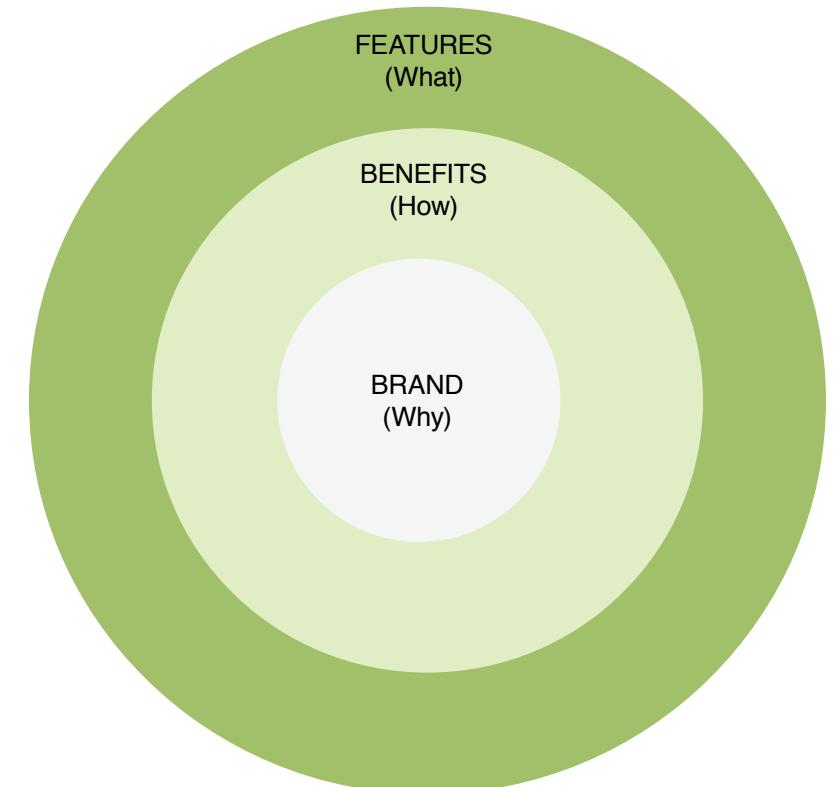
## Clarify voice & personality

Who are we and what is our personality? Why do we exist? What is our purpose, our cause and our beliefs? Right now our voice and personality is a little schizophrenic. We market to humans—and humans, by nature, do not care about what you are... they care about who you are. By building our brand from the inside out, we can connect with our values, goals, and customers even more.

## Product branding & messaging

If we are asking how to make our products seem more exciting, we're asking the wrong question. To win attention these days we need to ask a different question "How do/can we help?" What benefits do we provide to the target audience in relation to each product and its key message.

*If we are asking how to make our products seem more exciting, we're asking the wrong question.*



MY FIRST TIME MEETING CLEVER



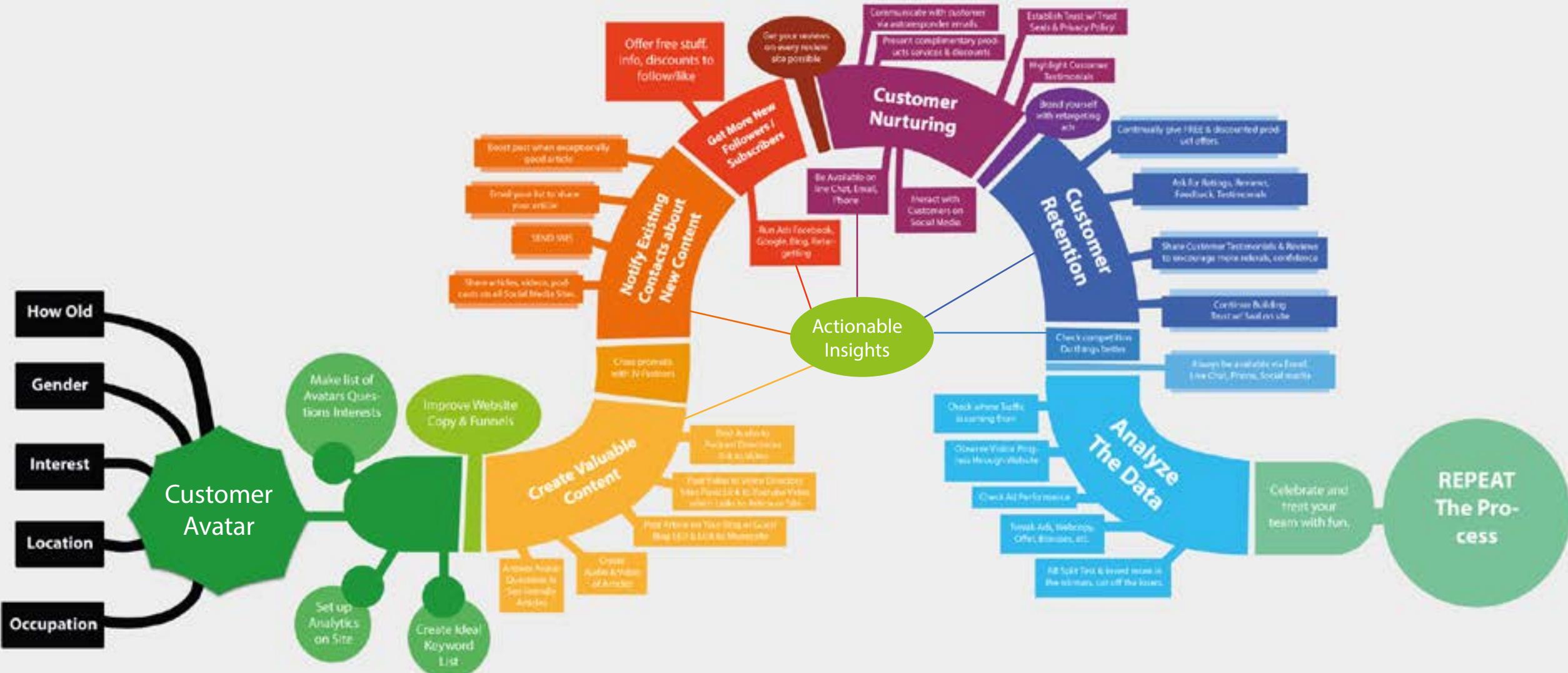
# CUSTOMER JOURNEY

FOCUS ON CUSTOMERS & RETENTION

Kathleen Dubord

# Thinking, planning & acting like a brand

Clever needs to stand out to cut through the noise.



# RECOMMENDATIONS

## Focus on retention

Clever puts more effort into customer acquisition than they do for customer retention. We have systems in place when there are issues or complaints and do a great job there. But we don't do a great job at creating a branded relationship after the sale to show how much we value them and encourage them to keep doing business with us.

- » Creating a community among our advocates
- » Provide exemplary customer service
- » Making our customers feel heard and valued
- » Associating our brand with a positive experience
- » Keeping our customers interested and engaged
- » Showing customers we want their business.

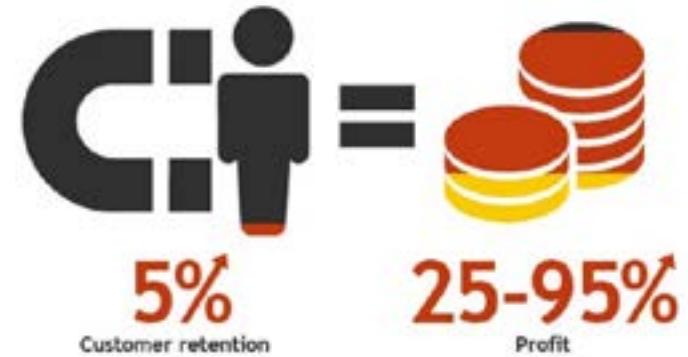
## Prepared for the future & equipped to make strategic business decisions

- » How likely it is that you'll be able to keep each new customer you gain.
- » How long you'll be able to retain each customer if you continue with your existing strategies.
- » How much your company may grow in the future.

## Recognize when a problem is likely to emerge

- » There may be a problem with your product or service.
- » When customers may be unhappy with your customer service.
- » When one of your competitors may have jumped ahead in market share thanks to a new found competitive advantage, such as better technology, an improved buying experience, or product improvement.

Increasing customer retention rates by 5%  
increases profits by 25% to 95%



Formula

$$CRR = ((E-N)/S) \times 100$$

# WHAT'S IT MEAN TO

# BE A CLEVER INVESTOR?



## ON BOARDING NEW CLEVER INVESTOR

AMAZING  
ON BOARDING EMAILS

VIDEO TUTORIALS

RECOGNITION FOR  
MILESTONES

PRO TIPS

EMAILS FROM  
SUPPORT

EMAILS FROM CLEVER  
AGENT (CRM)

TESTIMONIALS

## CHURN STATE 3RD-5TH MONTH

FREE TRIALS  
FREE CLEVER SUMMIT  
ONLINE VIDEO

WEEKLY MOTIVATION  
TEXT FROM CODY

PREMIUM YOUTUBE  
SUBSCRIPTION

TESTIMONIALS

MOMENT OF JOY

ATTRITION MONTH  
DISCOUNT

MOMENTS OF  
RECOGNITION

LOYALTY PROGRAM

CONTEST

DISCOUNTS ON  
PRODUCTS

CODY IN CAR  
GETTING COFFEE

SWAG

## LOYAL & ADVOCATE 6 MONTHS - 1+ YEAR

REMOTE CONTROL  
LAMBO

VOICE MAIL OR PHONE  
CALL FROM CODY

ONE ON ONE CALL  
WITH MENTOR

REFERRAL PROGRAM  
EARN FREE OR \$

SWAG BAG

1ST COME 1ST SERVE  
PROPERTY REFERRAL

CODY & GUEST IN CAR  
GETTING COFFEE

SWAG BAG  
DISCOUNTS ON  
PRODUCTS

FREE TRIALS

???

???

???

???

SHARING THEIR EXPERIENCE  
WITH THE WORLD

# CLEVER LEADERBOARD



Filter by

MOST COMPLETE



## Real estate mogul leaders



Bryce H.

GuardMate  
#1 of 1,654



Heather R.

Gymboreeze  
#2 of 1,654



Marcus A.

Anytee  
#3 of 1,654



Brandon M.

CurBte  
#4 of 1,654



## Up & coming learning leaders



Luke W.

Patchwerk  
#1 of 1,654



Maxwell T.

FreightLingo  
#2 of 1,654



Sam H.

Hawker  
#3 of 1,654



Lauren D.

DunkKing  
#4 of 1,654



Rachel N.

Racquetz  
#4 of 1,654



view all up and comers

A dark, semi-transparent background featuring a man in a suit holding a red briefcase. The background is filled with floating dollar bills of various denominations, suggesting wealth or investment.

# INVEST IN CONTENT

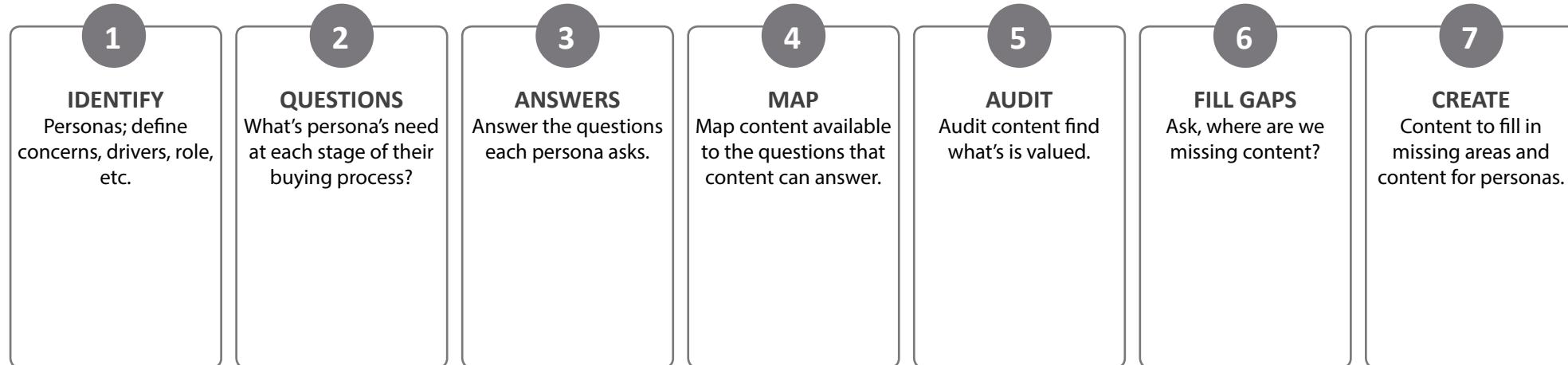
CREATE & CURATE TO BOOST EXCITEMENT & CONVERSION

# RECOMMENDATIONS

## Creating Avatar's or Personas

This allows us to carefully craft a messaging matrix that defines our branded language when speaking to each persona in regards to our product; its features and pricing. Each persona is then aligned with our marketing automation and CRM customer flow so consumers can be identified, segmented and fed the appropriate content at the appropriate time. Combined with insight from internal resources and practicing unified marketing we can develop an intelligent customer strategy by constantly measuring metrics and filling gaps as necessary.

- » Create custom audience in Facebook and look at demographics
- » Social listening – What are people interacting with, discussing, asking?
- » Interview prospects and customers
- » Interviews with people we want to become customers
- » Customer surveys and market research
- » Internal workshop with different teams to provide insights such as sales





**CODY**

- » THINKS & FEELS
- » INFLUENCES
- » PAIN POINTS
- » GOALS / WHY
- » CHANNELS



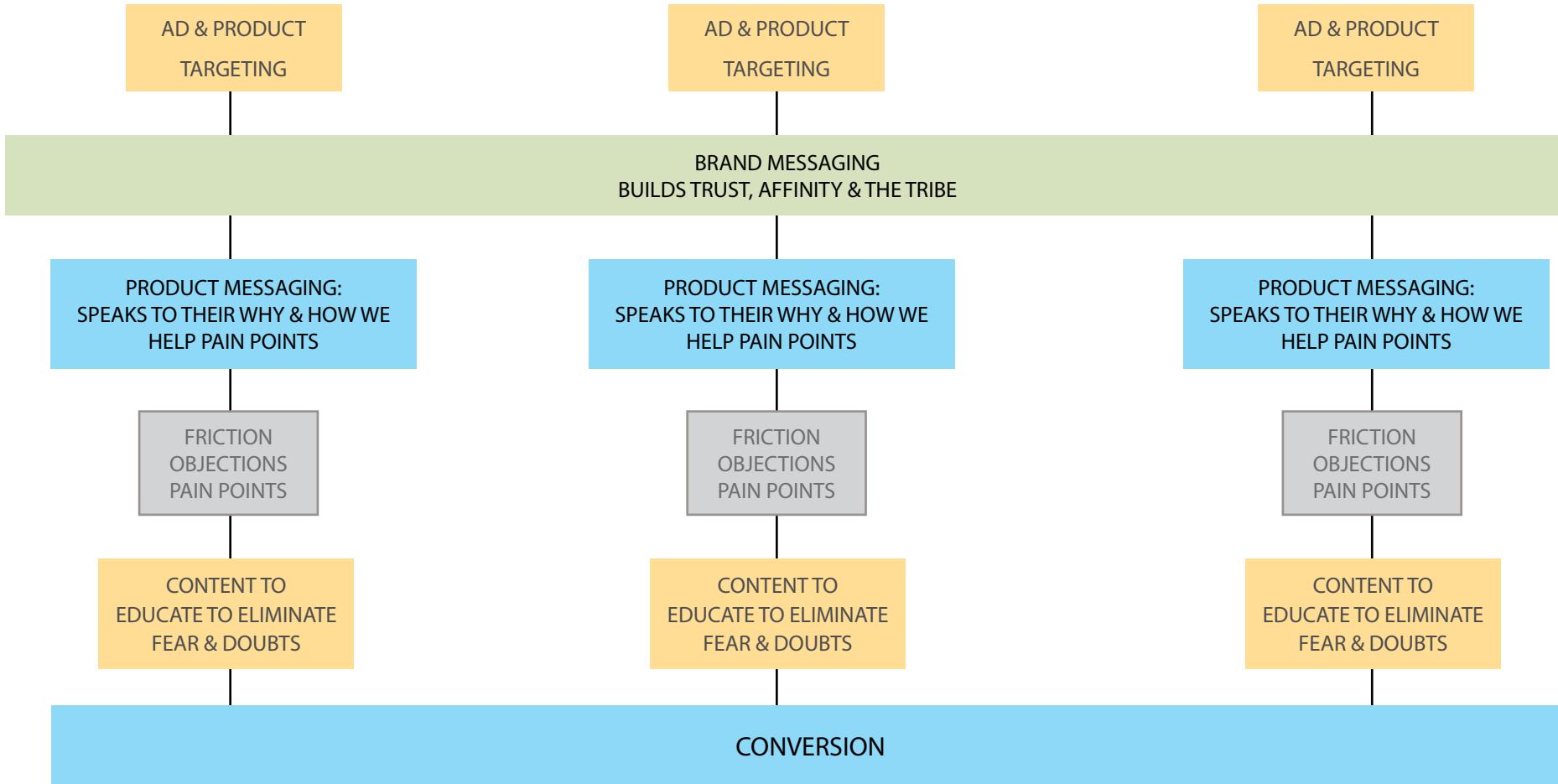
**LEIF**

- » THINKS & FEELS
- » INFLUENCES
- » PAIN POINTS
- » GOALS / WHY
- » CHANNELS



**EL JEFFE**

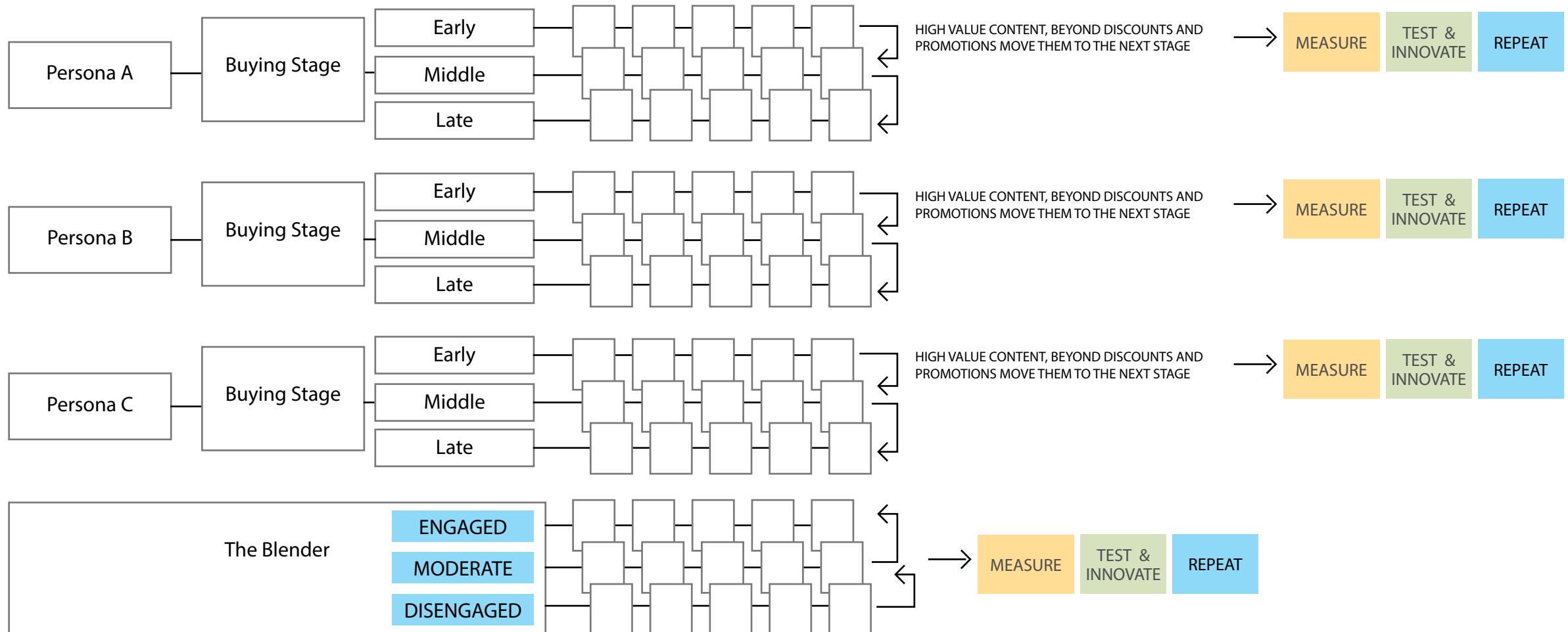
- » THINKS & FEELS
- » INFLUENCES
- » PAIN POINTS
- » GOALS / WHY
- » CHANNELS



# RECOMMENDATIONS

## Content mapping

The buying process can vary for different personas, for this example it is broken down into five basic stages where content is determined by questions which personas would ask as they move through the buying process. Each persona's customer lifecycle would be monitored, adjusted and tested to know how and where improve is needed. Predetermined metrics will help define success and also show effectiveness at each stage.



# OPTIMIZATION

STANDING STILL IS MOVING BACKWARDS



# RECOMMENDATIONS

## Drastic changes. Fail fast & iterate.

It's always good to be testing but sometimes you need to fix what's broke. I like marketing to remain agile, iterate and fail fast. It's the only way to test theories, innovate and stay on top of trends. Even if we are OK with failing and iteration, that doesn't mean it will be done haphazardly. Best practices remain.

## Fixed, schedules for everything.

This is the cadence at which we march to continually improve.

- » Scheduled landing Page A/B testing, email subject line testing, Ad testings
- » Content calendars & production calendars plus experiments and innovation calendars
- » Scheduled reporting on outcomes, metrics and KPIs from your area of ownership
- » Yearly and quarterly company initiatives and marketing planning

## Testing is where tactics lie. Creating is where innovation lives.

It's important to spend time conceiving and think like there is no box. What are the things we have never tried that can have a huge impact versus the small tweaks that move the needle.

## Every channel needs a documented strategies, goals & KPIs

Each channel needs a documented strategy with defined goals, and metrics to show success. Until this is done, activities have no direction boundaries.

### Youtube Example Core Objective:

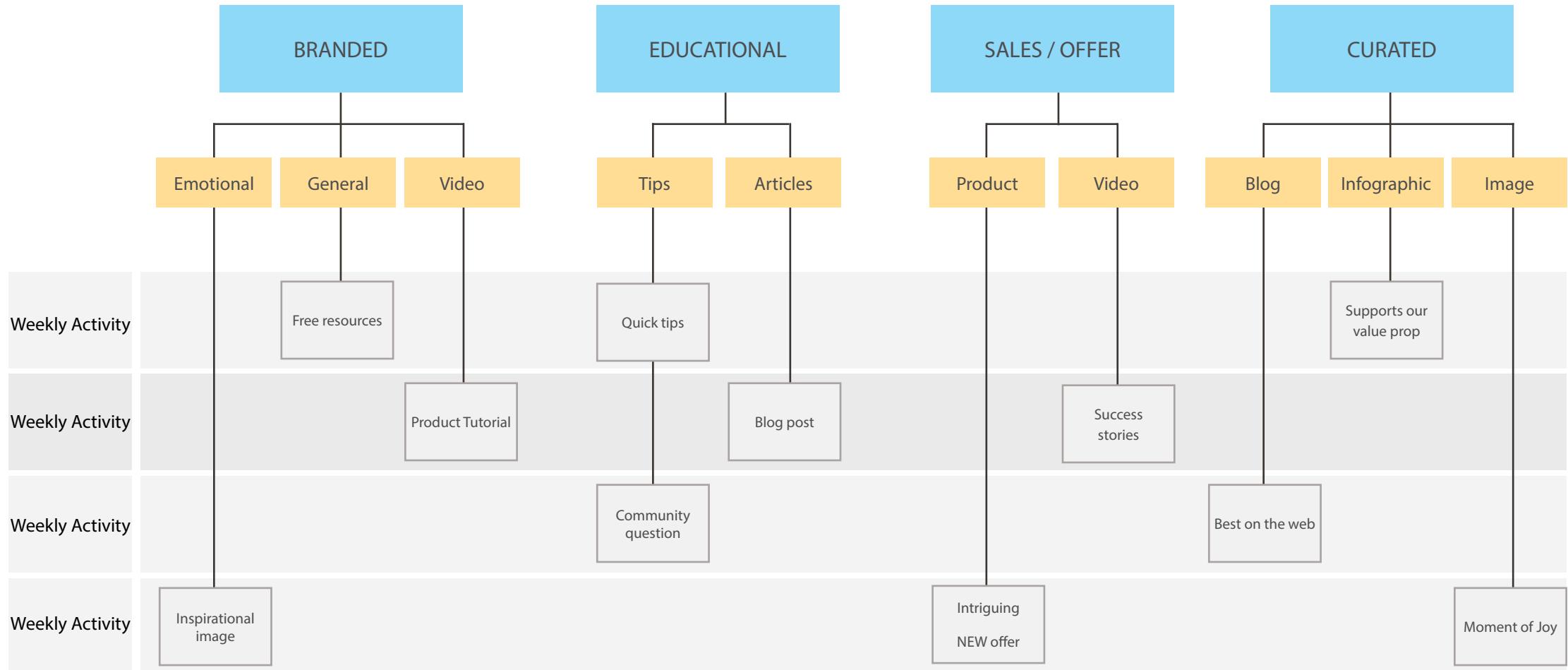
YouTube's core objective is to provide Thought Leadership. We do this by providing Real Estate tips, advice and motivational content around the entrepreneur mindset. We want to attract X amount of impressions per month, X amount of views per month, X% of these visit our website/product page (which converts at X%).

### Youtube Example Secondary Goal:

We want X amount of these new visits to follow us on X channels. \$X amount of revenue is made by displaying ads on our videos. X% of leads are converted by YouTube content used in various points of our funnel.

# RECOMMENDATIONS

## FACEBOOK PUBLISHING CALENDAR



# RECOMMENDATIONS

## Lack of up tactical planning

As a fly on the wall in meetings there's a lot of post launch corrections related to disjointed advertising, copy, emails, etc.

- » Show the team proposed user flows
- » All creatives need to go through an approval process to ensure cohesivness
- » Show the team propose email program with suggested A and B versions of the From: Subject: and Preheaders
- » Tell us how you're A/B testing email copy, the philosophy and what you expect the outcome to be

# PROCESSES

STRUCTURE & ACCOUNTABILITY

## Autonomy might be leading to apathy

There seems to be very little transparency into exactly what is being done, when, amount of time, results, etc. despite meetings. It's "I'm going to do this." There's no accountability into the result, delivery and strategy.

## Project processes

I talk a lot about accountability and ownership, how it trickles down to each team member in marketing. Transparency creates accountability, high performing marketing teams need documented project processes. I want everyone to understand how long every type of marketing project takes from cradle to grave versus arbitrary dates pulled out of you know where. What are the steps, milestone and deliverables. What team member is responsible for what and the consequences for failure. Accountability is a two way street. Some of the processes that need to be developed are:

- » Project kickoffs - You tell us requirements, hopes and dreams & we'll make it happen.
- » Review process - Simplify who the owner and one reviewer is.
- » Post mortem reviews - Let's discuss what went wrong and fix.
- » Common project turnaround times - Establish agreed upon / standard times

## Project Management

It's important the project management system uses automated work flows to eliminate manual passing of tasks from one team member to the next. For example, once a copywriter is done writing the copy and completes the task it should automatically move that task to the designer and notify them.

- » Everyone is required to use it and check off tasks.
- » Project templates need to be created for common projects.
- » Everything we do is inside the system and planned. We need complete transparency in workload and accountability

## Do you have the right people & responsibilities

Can we utilize our resources better or do we have the right people doing what makes the largest impact? Example is Zach needs to be writing copy versus Trevor. We need to get the resources developed to streamline his process, know the voice and represent the brand without Trevor.