Account Intake

The very first thing you should do after a client is 100% signed up and ready to go is begin to gather all of their account information. It is extremely important to gather all of the information in the beginning in one call, then later when there is an issue and you need a particular log in and the client can't be reached for four days causing major delays. The key account logins that you need are:

- Primary Contact Information
- Primary Email Address
- Address
- Host (FTP)
- Registrar
- Content Management System (CMS)
- cPanel
- Auto Responder access
- Phone Number to focus calls towards
- Google AdWords access (if already in use)
- Google Analytics access
- Google Webmaster tools
- Bing Webmaster Tools

Particular logins like the Host, Registrar, CMS, and cPanel are crucial to have when needing to perform updates to the site. The auto responder and phone number are important key pieces of information when setting up landing pages to track conversions. Other needs of access like Google Webmaster Tools and Bing Webmaster Tools are important tools to use when trying to get the website to rank on those search engines.

Account Creation

After you have received all of the important logins and passwords from the client, it is time to begin creating some accounts that will be beneficial. The accounts that are being created are important accounts for the client. The accounts you need to create are:

- Google Gmail
- YouTube
- Call Tracking Metrics
- Any of the Account Intake Accounts if not already made

These accounts are important for many reasons. The Gmail account will be used for all citation listings, in particular Google+. The YouTube account will be used to create optimized videos for ranking on YouTube. The Call Tracking Metrics account is so that you can actively track how successful you are and how many conversions you are getting for your client.

Target & Offer

When a new client is signed with your firm, it is crucial that you fully understand the client and what they are trying to achieve. You should have a scope of work to fully know what you are doing for your client, information on their lead funnel, their offer, and a customer avatar. By having all of this information up front, it makes it easier for all members of your team to know what the client is looking for and be on the same page.

The scope of work is an outline of all work that is expected to be completed for that client. This is very helpful so that you are not doing tasks that are not relevant to the goals of that particular client. For each goal that is to be completed, you should list the steps on how you are going to accomplish it. This forms clarity for everyone involved.

By having information on the offer that the client is using, as well as information on their lead funnel, it allows you to cater your marketing directly towards what the client is trying to achieve. Important pieces of information to gather for the funnel are:

- Type of Leads Caputuring
- Lead Funnel or Lead Direct Response
- Funnel Length
- Size of Target (Annual Sales)
- Value of each Lead
- Leads to Conversion Ratio
- Monthly Goal
- What do they need (Top of Funnel)
- Why do they need it (Middle of Funnel)
- What will make them buy it now (Bottom of Funnel)

The customer avatar is a description of your client's average customer. This is important information to have when designing advertisements, onsite content, and any other aspect of marketing. If you do not have this information, the work you are doing could be completely useless because it is geared towards the wrong audience. The pivotal information you need to gather for the customer avatar:

- Name
- Age
- Sex
- Married
- Children
- Highest Level of Education
- Annual Income
- Race Decision Maker

Keyword Report

Setting up a list of keywords that you want to focus on search engine rankings for is important to have in one location. In this section it is ideal to keep track of monthly keyword rankings for Google, Yahoo, Bing, and YouTube. It is vital to have a landing page focused on each particular keyword. This is also where the client can stay updated whenever they want to know how each keyword is doing.

Site Needs

The Site Needs section has two parts. The first part contains a few important pieces of the site build, while the second is made up of site corrections. The important pieces of the site build are:

- Create/Optimize Contact Us Page
- Set up Landing Page Program Plugin
- Create Landing Page Banner Graphics
- Install Master Plugin

It is crucial to have an optimized contact us page on every website you are trying to rank. It is important for search engines to easily see that a customer is able to get information on how to connect with the website quickly and easily. It is important to have a graphic designed for the landing pages. The graphic designer should make sure they look at the target & offer section before designing this. If they don't, they will most likely waste time creating a graphic that will need redone and refocused to the actual target audience. The master plugin contains a list of around thirty plugins that are all important for WordPress websites. Some of the plugins included are the landing page program, review plugin, SEO Yoast, and many others that will help optimize the site.

This section also has an area for Needed Corrections. When someone finds an issue with the site, they place it here and let the Project Manager know, who will then assign the correction to the proper person. It is smart to have the date the correction was found, date assigned to be corrected, and date fixed.

Site Audit

The site audit needs to be done by an experienced Web Developer. The purpose of this is to extensively look at the website to determine what steps to take to make sure it is fully optimized to its maximum potential. Some of the key components they look at:

- Google Webmaster Tools
- Bing Webmaster Tools
- Google Analytics
- Contact Us Page
- Footer Navigation

- Server Issues
- 404 Errors
- Dead and Broken Links
- Site Maps and Submissions
- Meta Descriptions

PPC Build

The PPC Build section has to do with the advertising campaigns for Google AdWords. This is where you can easily keep track of the crucial elements of creating and keeping track of these ads. This contains important steps like:

- Setting up Dynamic Code for Call Tracking Conversions
- Link Analytics to CTM
- Set up Google Tag Manager
- Setup Click to Call
- Install Conversion Tracking Code

There are a few guidelines to follow when setting up your AdWords campaigns. There should not be more than 10 keywords per Ad Group. You don't want to overdo it. The keywords you use should be the same as the SEO keywords that you are tracking for your client. Lastly, each Ad Group should have its own specific landing page.

Citations

The Citations section has a list of around 150 of the top free online citations. It is broken down into three sections. The first month the top 10 citations should be claimed. The following month the rest of the Top 25 should be claimed. The third month the rest of the Top 150 should be claimed. When claiming citations, make sure that the address, phone number, and website link are the same across all citations. You should also have five pictures that are saved with the keywords in the file name.

Content

The Content section is where the links to all of the websites that you most content to. It is important to use Web 2.0 accounts like Blogger, Word Press, and Tumblr, as well as other Micro sites to spread the content out. Below these listings, as content is created, we keep track of it all in one locations so that we can easily access all content links with one click.

Interview

The Interview section is all steps involved in creating a video interview that you can fully optimize and get to rank on YouTube. The first step is creating an outline that has all of the questions you are going to ask. This gets sent to the client ahead of time so they have an idea what to expect.

Since the majority of our clients are in other areas of the world, the best way to do the video is by doing Google Hangouts. These are very easy to use and instantly upload to your YouTube account.

After the interview has been done and uploaded to YouTube, you must edit the videos. The video is generally around 20 minutes and is broken down into 5 smaller videos that is each focused on one of the SEO keywords. The opening screen shot should be a logo of your marketing company. The video should end on a screen shot that has a call to action. It should have the name of the company and the phone number. The title of the video should have the SEO keyword you are focusing on and the call tracking phone number. To optimize the description, it should start off with a link to the landing page for the keyword you are focusing on and should end with a full citation of the name of the company, address, call tracking phone number, and URL to the home page. The body of the description should be a transcription of the interview.

Press Releases, CTM Report, and PPC Report

The last three tabs are for weekly and monthly reporting. Under the Press Release tab, all press releases that are sent out should have their URLs in this tab. The CTM tab should be updated each week by pulling the week's reports with every call and added here for easy access. The PPC Report tab should also be pulled at the start of each week. It is important to keep up on both of these reports to keep track of how many conversions you are generating.