

2026 MARKETING GROWTH STRATEGY

Priorities

- GET MORE COMPANIES PAYING FOR TESORUS
- GENERATE MORE CONSULTING CLIENTS
- STRENGTHEN OUR IDENTITY AS TRUSTED, CONNECTED PARTNERS

DIRECTION

- LeadWell wants to help...
- Grow revenue, increase sales, improve internal systems...
- For businesses above \$1m in revenue...
- Through tactics and tools...
- To build trust as a partner for the future.

SMART Goals

- CLOSE 24 NEW TESORUS CUSTOMERS BY THE END OF Q2 TO COVER 2026 PLATFORM COSTS, DRIVEN BY SOCIAL MEDIA LEAD GENERATION, TARGETED DIRECT OUTREACH, AND REFERRAL PARTNER INTRODUCTIONS.
- CLOSE 48 NEW CONSULTING CLIENTS BY DECEMBER 31, 2026, AVERAGING ONE NEW CONSULTING CLIENT PER MONTH, THROUGH STRATEGIC REFERRALS, THOUGHT-LEADERSHIP CONTENT, AND TARGETED OUTBOUND CONVERSATIONS WITH FOUNDER-LED AND GROWTH-STAGE COMPANIES.
- INCREASE OVERALL MARKETING ENGAGEMENT BY 40% BY THE END OF Q4 2026 BY IMPROVING SOCIAL MEDIA INTERACTIONS, EMAIL CLICK-THROUGH RATES, AND BLOG TIME-ON-PAGE, AS MEASURED BY PLATFORM ANALYTICS AND GOOGLE ANALYTICS.

FUNNEL

Intent signals, prior work, social media (Interest)

DMs on socials, intent-email flow, drip email
(engagement)

Call/mailer (credibility)

Discovery call (contract)

Intent → Email → Click → Call → Demo → Consultant → Close

Tesorus feeds the top. Consultants close the bottom. Marketing connects the middle.

CHANNELS

Cold call

Email (by intent)

Social

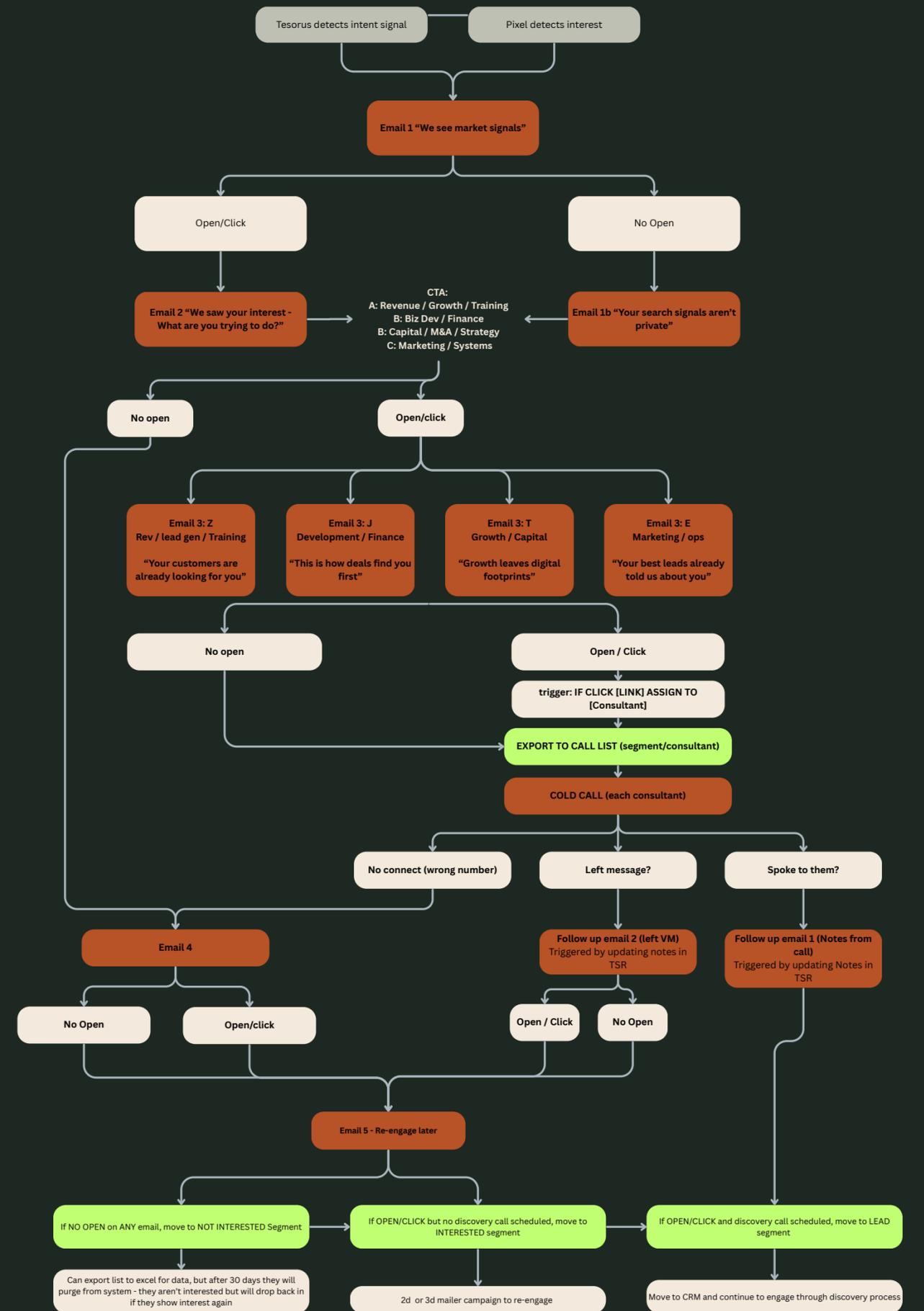
mail

Referral partners

Events

Email Campaign

- 5 emails, 1 call, 1 mailer
 - additional emails sent from each consultant organically after call
- Topics: [OR]
 - Business Consulting Services
 - Sales Management Training
 - M&A Strategy
- Audience:
 - Business email: not empty (adding back into filter fields)
 - Job title contains: Founder, Owner, Marketing, Communications, Development, Operations, Sales, Finance
 - Seniority Level is equal to: Manager, CXO, Partner, VP, Senior, Founder, Director, Owner
 - Company revenue: \$1M–\$50M
- Daily expected prospects: 12,082
- Daily volume: 1000
- Budget: \$24k+



CONSULTANT SPECIALTIES

Zach

Clients looking for lead gen, sales and management training, sales insights

Jason

Clients needing deal strategy, M&A structure, finance resources

Torrey

Clients looking for growth assistance, succession, culture audit, and capital strategy.

Emma

Clients looking for marketing assistance or communication optimization

We split by interest, not industry.

Industry tells us what they sell. Interest tells us why they will buy now.

Customer calls:

We don't cold call lists. We call signals.

Calls happen when:

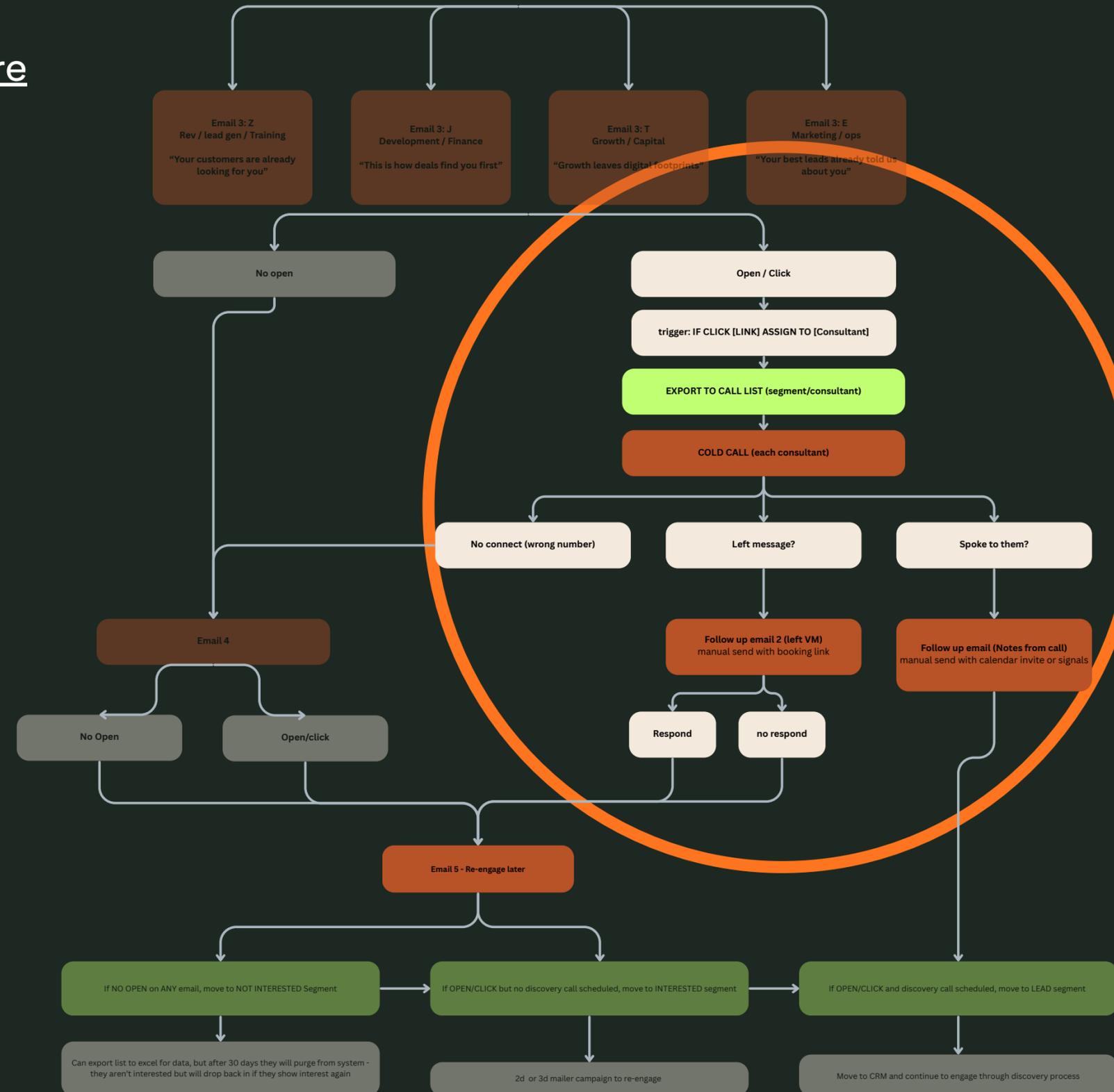
- Someone clicks but doesn't book
- Intent score spikes
- They engage with multiple emails

Contacts will be moved to a CALL LIST segment for each consultant in tesorus and "assigned" for outreach if they meet this criteria after 3 emails.

This makes outreach warmer, faster, and more relevant.

Call Script

[See script here](#)



SOCIAL MEDIA

Content focus rotates:

- Thought leadership (credibility)
 - text post, blog, videos
- Product (Tesorus/revent/rover)
 - always includes images/use videos
- Services (Leadwell verticles)
 - images/graphics
- Current events (relevance: events, case studies, pop culture, etc)
 - Include relevant photo: real people, stills from show, movie, book cover, etc.

This keeps us visible while the intent engine works in the background.

Graphic themes:

- Clean
- Professional
- Motion graphics
- Talking heads

Social Calendar

Post to LinkedIn

- 3–4 times per week
- 3 days a week (minimum) engaging with community
- DM 10 people per week to warm lead to discovery call.
 - “I’ve seen you engaging in LeadWell’s content lately. Can we get 30 minutes on the calendar next week to talk about your goals for 2026?”

Post to Blog:

- 2x per month (minimum)
 - content posted from LWA or Emma
 - Start thinking about things you’re interested in. It will be important to display everyone’s individual thought leadership in the future, but we are still figuring out the most successful modality.

CURRENT MQL SQL PROCESS

MQL — Marketing Qualified Lead

Who: Right type of company + showing buying signals

Has NOT talked to sales yet

Becomes an MQL when they:

- Click a campaign email link OR
- Visit key website pages (services, pricing) 2+ times OR
- Download content / fill out a form

AND

- Match our target company profile (audience filters)

Owned by Marketing

SQL — Sales Qualified Lead

Who: MQL that Sales has spoken with and confirmed is a real opportunity

Becomes an SQL when:

A Discovery Call is completed AND Sales confirms:

- They have a real business problem we can solve
- They are a decision-maker (or direct influencer)
- There is a timeline to act

Owned by Sales (JJ, TB, ZW)

Simple Rule:

MQL = Engaged and fits

SQL = Spoke to us and is serious

Current LWA Sales Process:

- Pre-discovery: audience bucket
 - Shows interest but not diagnosed needs
 - Moves to discovery when D-call is scheduled
 - How do we move people to discovery? Who is responsible for moving each contact?
 - inbound from marketing; outbound from sales
- Discovery: first meeting with prospect
 - Needs analysis (“up at night”, challenges, goals)
- Diagnosis and design: comes from discovery
 - Internal conversation. Quantifiable approach to problem solve. Create proposal/contract SOW
- Contract:
 - closed/lost
 - closed/won
 - nurture

Marketing Pipeline Terms:

- (Pre-Discovery) Suspects are anyone in your target market
- (Pre-Discovery) Prospects are qualified suspects with need/fit
- (Pre-Discovery; Discovery) Leads are prospects taking action
- (Discovery) Opportunities are prospects with a strong intent to buy, budget, and authority
- (Contract) Customer is someone who has completed the purchase

PIVOT POINTS

GOAL 1

Metric	Green (On Track)	Yellow (Watch)	● RED = PIVOT	Pivot
Intent Accounts / Month	250+	200–249	< 200	New intent signals
Email CTR (E1–E2)	5%+	3–4.9%	< 3%	rewrite offer + CTA
Demos Booked / Week	15+	10–14	< 10	add follow up call in 24 hours
Demo Show Rate	70%+	60–69%	< 60%	add SMS + calendar reminders
Close Rate (Demo → Customer)	30%+	20–29%	< 20%	Fix narrative or change ICP
Customers Closed by March 31	6+	4–5	< 4	Shift more resources to outbound + calls

GOAL 2

Metric	Green	Yellow	● RED = PIVOT	Pivot
Discovery Calls / Month	20+	15–19	< 15	Increase outbound volume + add LinkedIn touchpoints
Discovery → Proposal Rate	60%+	50–59%	< 50%	Tighten discovery qualification
Proposal → Close Rate	40%+	30–39%	< 30%	Pricing/package issue
Referral-Sourced Discoveries	35%+	25–34%	< 25%	Launch referral partner campaign
Clients Closed by June 30	18+	12–17	< 12	Add industry specific campaigns

GOAL 3

Metric	Green	Yellow	● RED = PIVOT	Pivot
Email Open Rate	35%+	30–34%	< 30%	Subject line change + sender testing
Email CTR	4%+	2.5–3.9%	< 2.5%	Offer or CTA problem
Social Engagement Growth (QoQ)	10%	+5–9%	< +5%	Change content format (Video > text)
Blog Time on Page	90s+	60–89s	< 60s	Content not relevant → shift formats (podcast only)
List Growth (Quarterly)	8%	+5–7%	< 5%	Add lead magnets or events to calendar

SIMPLIFIED METRICS

Metric	Weekly Target
Leads	20
Qualified Opps	8
Tesorus Deals	2
Discovery Calls (Consulting)	~15/week

BACKGROUND

WHAT MUST GO RIGHT IN 2020

STRATEGY

OUTREACH

Email Campaign

GOALS

Goal	Weekly Target	Monthly Target	Notes
Leads	20	100	100% completion
Qualified Opps	8	40	100% completion
Tesorus Deals	2	10	100% completion
Discovery Calls (Consulting)	~15	~75	100% completion

Social Calendar

OTHER CAMPAIGNS

- Revent
 - email and post mail
 - Goal: customers
- Peak
 - Email and social media
 - Goal: recruit nurses
- Pederson
 - Email, mail, social
 - Goal: find people selling homes
 - Goal: find new RE agents to train/recruit
- Lacrosse Lumber
 - List building for 5 regions; lists sent to managers of regions to deploy through their marketing team
 - Goal: 2500 prospects per month
 - ICP: waiting to talk to their team (meeting rescheduled)
 - La Crosse: intent-driven builders/contractors tied to vendor promos, proving co-op ROI.
- Northwestern mutual
 - List building (and email?), 12 offices (zip code based). Send the same emails/location but change contact information.
 - Goal:
 - ICP:
 - Northwestern Mutual: intent-driven insurance/financial prospects per office, with enough engagement to qualify as real sales leads.

Note: Set expectations around brand awareness when it comes to anything “marketing” related. Remind people that marketing sits in the middle of the funnel between NEED/INTEREST and SALES, but we can offer other solutions to help them close deals if they need that support.