

## Sales

### ACTION ITEMS

Cross Sell, Referrals, Repeat Business  
Close Deal  
Follow Up  
Proposal  
Presentation  
Book Meeting  
Phone Rings

### TOOLS

CRM  
Easy Payment Options  
CRM  
Docu Sign  
Zoom  
Greminders  
Phone Script

## Marketing

### STRATEGY

Search Engine Optimization  
Search Engine Leads  
Social Media Leads  
Email Marketing  
Video Ads  
Offline Marketing

### TOOLS

SEM Rush  
Google Ads  
Facebook Ads Manager  
Mailchimp  
YouTube  
Business Cards

## Website

### GOAL

Quality Website  
Ad Copy  
On Page SEO  
Web Design  
Graphics

### TOOLS

Trello  
Writer  
SEO YOAST  
WordPress  
Photoshop

## Brand Identity

### ACTION ITEMS

Logo Creation  
Business Name

### TOOLS

Photoshop  
Call us

# 4 STEPS TO Successfully Get New Clients

