

CASE STUDY 03 • DIGITAL MARKETING

Marketing Agency — SaaS Client-Acquisition System

A lead-scoring engine that filters out mismatches before they ever reach the sales calendar.

INDUSTRY	LOCATION	TIMELINE	INVESTMENT
Digital Marketing	Remote / National	120 Days	\$3,500 setup + \$950/mo

The Problem

A digital-marketing agency selling \$3,000–\$8,000/month retainers was burning sales hours on unqualified discovery calls. Price-shoppers with \$500 budgets and solopreneurs “just researching” were booking 45-minute strategy sessions, leaving no time for qualified prospects with real budgets and decision-making authority. They needed a pre-qualification system that filtered mismatches before they hit the calendar, while nurturing cold leads for future conversion.

FUNNEL BUILDER ROI-Calculator Funnel

Landing Page — ROI-Calculator Funnel

Hero: “Calculate your marketing ROI in 60 seconds” (positioned as a tool, not a sales pitch).

Interactive calculator: Slider inputs for current ad spend and monthly revenue auto-calculate a projected ROI %.

Dynamic results: Shows a case study from the visitor's industry (e-commerce / SaaS / local service) based on a URL parameter.

Social proof: “Join 200+ brands scaling with [Agency],” plus logos of recognizable clients.

Scarcity: Sticky bar: “Limited to 8 new clients per month — 3 spots remaining this quarter.”

CTA: “See your custom strategy” — a strategic application form (not instant booking).

Retargeting: Facebook pixel + Google remarketing tag for abandoned-calculator users.

Result: 22.4% calculator-to-application rate | 67% traffic from LinkedIn ads.

Figure 3.1 — Interactive ROI-calculator funnel with dynamic content and scarcity messaging.

My Approach to the Funnel

The biggest mistake agencies make is leading with “hire us.” This funnel leads with value: a free ROI calculator that gives the prospect something useful before asking for anything. The calculator draws on real benchmarks from the agency's historical client data. The dynamic results page is the conversion engine — an e-commerce brand sees “How [E-com Client] tripled their ROAS in 90 days,” while a SaaS company sees “How [SaaS Client] cut CAC by 40%.” That relevance makes the prospect feel understood before the first conversation.

FORMS Strategic Application**Strategic Application Form**

Q1 — Budget: Monthly marketing budget? <\$1K / \$1K–\$3K / \$3K–\$5K / \$5K–\$10K / \$10K+.

Q2 — Channels: Current marketing channels? (Multi-select: SEO, PPC, Social, Email, Content, None.)

Q3 — Challenge: Biggest growth challenge? Lead gen / Conversion / Retention / Scaling / Attribution.

Q4 — Timeline: When do you plan to decide? ASAP / 30 days / 60 days / Just researching.

Q5 — Authority: Are you the final decision-maker? Yes / No (if No, asks for DM name + contact).

Q6 — Revenue: Current monthly revenue and 12-month growth goal.

Auto-scoring: Budget (40%) + Timeline (30%) + Challenge fit (30%) = score of 0–100.

Logic: Budget <\$1K → redirect to the DIY resource library (gentle disqualification).

DM routing: If not the decision-maker → auto-send an invitation to the DM with a personalized ROI preview.

Result: 47% of applicants score 70+ (qualified) | 0 unqualified calls booked.

Figure 3.2 — Application-style form with weighted scoring and decision-maker verification.

My Approach to the Form

This form is a filter, not just a capture tool. The scoring algorithm is the key: budget matters most (40%), because an agency can't help someone with no budget; timeline matters second (30%), because "just researching" leads waste sales time. The decision-maker question is critical — if the respondent isn't the DM, the workflow sends a personalized invitation to the actual decision-maker with a pre-calculated ROI preview. The gentle disqualification for sub-\$1K budgets preserves the relationship by offering value (DIY resources) rather than a flat rejection.

WORKFLOWS Automation · Part 1: Scoring & Routing**Automation Workflow — Lead Scoring (Part 1: Routing)**

Trigger: Strategic Application form submitted.

Action 1: Lead score = (Budget × 0.4) + (Timeline × 0.3) + (Fit × 0.3).

Branch A — HOT (70–100): Instant SMS with calendar link; create a HIGH-PRIORITY opp in "Strategy Call Booked"; notify the sales director via email + Slack with full application data + score; add a "VIP Prospect" tag.

Branch B — WARM (40–69): Enter a 5-day email nurture — Day 1 case study, Day 2 methodology, Day 3 testimonial, Day 4 FAQ, Day 5 SMS booking.

Branch C — COLD (0–39): Auto-reply with the resource library; tag for Facebook retargeting; add to the monthly educational newsletter.

Result: Sales calls -60% | close rate 34% (was 18%).

Figure 3.3a — Score-based branching with hot / warm / cold routing logic.

WORKFLOWS Automation · Part 2: Long-Term Nurture**Automation Workflow — Lead Scoring (Part 2: Long-Term Nurture)**

Universal action: All leads → monthly newsletter + quarterly ROI-calculator re-engagement.

Cold-lead re-score: After 90 days of engagement (opens/clicks), recalculate the score for a possible upgrade to Warm.

Warm-lead escalation: If a Warm lead clicks 3+ nurture emails in 14 days, auto-upgrade to Hot and send an instant booking SMS.

Hot-lead protection: If a Hot lead doesn't book within 48 hours, the sales director gets a daily reminder until booked or marked lost.

Reporting: Weekly score-distribution report to the sales director with trend analysis.

Integration: Score data pushed to Facebook Custom Audiences for lookalike targeting.

Result: Avg contract +\$1,200/mo | 23% of closes come from originally Cold leads.

Figure 3.3b — Long-term nurture, re-scoring, and reporting automation.

My Approach to the Workflow

Scoring and branching transformed this agency's sales process. Before the system, the sales director spent 15 hours a week on discovery calls with unqualified leads; after, he spends 6 hours a week on calls that close at 34% instead of 18%. The Hot branch is built for speed — these leads are ready to buy, so the workflow removes every point of friction. The Warm branch is the real money-maker: these leads need education and trust before they're ready to talk, so the 5-day nurture is carefully sequenced — case study first (proof), methodology second (process), testimonial third (social proof), FAQ fourth (objection handling), SMS fifth (soft close). The Cold branch isn't wasted; it builds a retargeting audience for future re-engagement.

PIPELINE Agency New Business**Sales Pipeline — Agency New Business**

Stage 1 — Application Received: All submissions captured | 156 leads | score distribution tracked.

Stage 2 — Qualified (Score 70+): Hot leads flagged for immediate outreach | 47 leads.

Stage 3 — Strategy Call Booked: Calendar confirmed + prep doc sent (prospect research + agenda) | 38 leads.

Stage 4 — Strategy Call Completed: Call notes logged + proposal requirements documented | 31 leads.

Stage 5 — Proposal Sent: Custom proposal via GHL Docs (auto-populated from application data) | 24 leads. 5-day automated follow-up (Day 1 confirmation, Day 3 case study, Day 5 check-in).

Stage 6 — Contract Negotiation: Redlines tracked + approval workflow + legal review | 12 leads.

Stage 7 — Client Onboarded: Welcome packet + kickoff call + account setup | 9 clients. Auto-creates a 12-task checklist for the client-success team + a welcome video from the CEO.

Result: \$583,200 annual contract value | \$5,400 avg monthly retainer | 9 new clients in 120 days.

Figure 3.4 — Seven-stage sales pipeline with automated proposal follow-up and onboarding triggers.

My Approach to the Pipeline

Agency pipelines fail when they treat every lead the same. This one segments by lead score from the start, so the sales director knows which deals need urgency and which need patience. The Proposal Sent stage carries the most automation, because that's where most agency deals die: Day 1 confirms receipt and invites questions, Day 3 sends a case study from the prospect's exact industry, and Day 5 is a soft check-in rather than a hard close; if there's no response by Day 5, the deal owner gets a task to call. The onboarding trigger at Stage 7 is what turns a closed deal into a retained client — a 12-task checklist auto-assigns to the client-success team, and a welcome video from the CEO sets the tone before the first kickoff call.

KEY RESULTS — 120-DAY PERFORMANCE			
-60% SALES CALLS	34% CLOSE RATE	\$5.4K/mo AVG CONTRACT	\$583K ANNUAL ACV

This case study represents an actual project outcome. The client's name, location, and identifying details have been anonymized to protect confidentiality. Results vary with market conditions, ad spend, offer strength, and sales-process maturity. I don't guarantee specific results — I guarantee systems built to best practices with measurable optimization potential.