

Scaling Local Authority & Predictable Growth

EMERGENCE MARKETING GROUP

emergence
MARKETING GROUP

OUR MISSION

We empower small businesses with scalable marketing systems designed to drive sustainable growth and long-term independence.

emergence
MARKETING GROUP

EXECUTIVE SUMMARY

- National authority presence established
- Local brand expansion in early growth phase
- Current CRM not optimized for scale
- Marketing efforts active but not systemized

Opportunity: Build infrastructure that converts authority into predictable growth.

MEET THE TEAM



Founder & Digital Strategist
Anna Kasson

Anna leads EMG's strategic direction, helping service-based businesses build marketing systems that drive measurable growth. She aligns marketing, sales, and CRM infrastructure to create scalable frameworks that turn visibility into revenue, with a strategy built for long-term success.



Co-Founder & Head of Content
Jake Kasson

Jake oversees content strategy and execution, ensuring every piece produced supports search visibility, authority positioning, and conversion goals. With a strong operational mindset, he bridges creative direction with performance metrics—helping clients build content ecosystems that compound over time rather than chase short-term trends.



Lead Designer & Developer
Hayden Robers

Hayden leads design and development with a focus on performance-first user experience. He builds clean, conversion-focused websites and landing pages that integrate seamlessly with CRM and marketing systems. His work ensures that brand presence, functionality, and scalability work together to support growth.



Digital Ads Expert
Andra Birkhimer

Andra specializes in paid search lead generation. She's a data-driven marketer focused on increasing conversions and lowering CPA, with a proven track record of generating leads for various businesses.

THE GROWTH STAGE YOU'RE ENTERING

You are transitioning from: *Advisor-led growth*

To: *System-led growth*



That shift requires:



Lead routing



Qualification



Visibility



Automation



Reporting tied to revenue

WHY EXPOSURE ALONE DOESN'T SCALE

Fox visibility = credibility
Website traffic = interest



But without:

- Integrated forms
- CRM scoring
- Follow-up workflows
- Pipeline reporting

Opportunity leaks occur.

emergence

MARKETING GROUP

EMG GROWTH FRAMEWORK

1.
Visibility

Establishing consistent, high-quality presence through search, content, and authority positioning so the right audience can find you.

2.
Capture

Turning attention into opportunity through strategically placed forms, landing pages, and integrated lead entry points.

3.
Qualification

Structuring intake systems that filter, score, and route prospects based on fit, ensuring time is spent on high-value opportunities.

4.
Nurture

Implementing automated follow-up and segmented communication that builds trust over time and keeps your brand top-of-mind.

5.
Conversion

Optimizing messaging, funnels, and internal processes to move qualified prospects into clients efficiently and predictably.

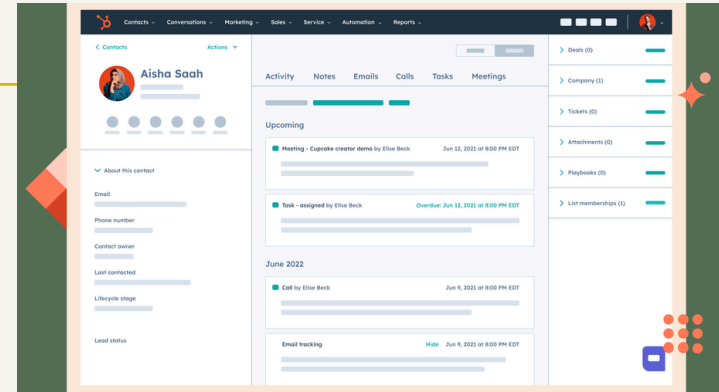
6.
Reporting

Tracking performance at every stage of the pipeline and refining systems based on measurable data – not assumptions.

Systems > tactics.

emergence
MARKETING GROUP

THE RAMP-UP PERIOD (FIRST 60-90 DAYS)



Phase 1:

Audit & Infrastructure

We conduct a full review of your **current marketing ecosystem, website structure, CRM setup, lead flow, analytics, and conversion pathways**. This phase identifies bottlenecks, missed opportunities, and structural gaps so we can build from a position of clarity rather than assumption.

Phase 2:

HubSpot Implementation

We migrate and configure HubSpot Sales and Marketing Hubs to support scalable growth. **This includes pipeline setup, custom properties, lead routing logic, automated follow-up workflows, reporting dashboards, and team training**. The goal is to create visibility, organization, and automation that support your expanding advisory team.

Phase 3:

Website Optimization

We refine the website to improve lead capture and qualification. **This includes embedding integrated forms, adding strategic qualification fields, aligning messaging with your ideal investor profile (50+ with \$1-3M portfolios), and improving overall conversion flow**. The objective is to ensure your authority translates into a structured opportunity.

Phase 4:

Authority Leverage Strategy

We develop a strategy to maximize your existing exposure, particularly Fox appearances, and convert authority into owned audience growth. **This includes evergreen SEO content planning, LinkedIn positioning strategy, media amplification, and newsletter segmentation to create long-term brand equity and local traction**.

SCALING INTO NEW MARKETS THROUGH INFRASTRUCTURE

Challenge:

→ *New market entry + no CRM systems*

Solution:

→ *HubSpot implementation, content strategy, automation*

Results:

→ *+31.61% revenue growth*

→ *+88% website clicks*

→ *860,000+ impressions*

Now:

→ *2+ year partnership*

[View Full Case Study](#)



emergence
MARKETING GROUP

NEXT STEPS

1.
Initial audit + tech review



2.
Confirm CRM transition



3.
Define 90-day priorities



4.
Begin Ramp-Up Period

Thank you!

EMERGENCE MARKETING GROUP

emergence
MARKETING GROUP