



Digital Sales Scope of Work 2022

Goal

- Improve and create a methodical approach that increases LiftFund's online sales.

Partnership

Seeking a successful, multi-channel digital firm's assistance in improving LiftFund's digital outreach, business intelligence and sales strategies. The firm must have a proven track record in the areas LiftFund is seeking to improve lead generation and conversion with LiftFund products and services. LiftFund is seeking a firm who will be a trusted partner and bring solutions and methods to improve LiftFund's impact in serving underbanked/underestimated small business owners. Firms responding to this SOW must provide examples/case studies along with references.

Seeking a firm with the following expertise:

- Proven track record in online sales success
- Consistently track traffic and source of leads coming to LF website
- Create and track online sales campaigns consistently
- Adjust and improve online sales campaigns to increase leads
- Effectively track activity generated by channel from initial click (ad, google) to application --> loans
- Track and determine cost of acquisition for channels LiftFund utilizes
- Report and assess to budget and tailor accordingly

Channel Priorities

- Website
- Online Application
- Product pages (samples below):
 - <https://www.liftfundloans.com/coastal-bend>
 - <https://www.liftfund.com/elpasodmf>
- Social Media
- Email marketing
- SEO
- PPC
- Digital Media Ads / PR

LiftFund Challenges

- Not able to effectively track visitors from website to application
- Not able to engage with visitors post-website visit with cookies or prompts for information
- Not using website as a sales tool
- Conversion rate from traffic (paid/organic) to applications is low

Needs

- Ensure accurate integration across all channels to effectively measure traffic, action and conversion
- Develop and set up utm for all utilized channels
- Consistent reporting that makes sense based on our goals
- Clean up google analytics, google ads and Facebook ad manager
- Leverage LevelFi (pre-application assessment tool) and loan pages more (LF vs unique URL)
- Leverage email marketing and lead generation sources (level fi, contact us form)

For questions and submissions, please contact Martha Zurita at mzurita@liftfund.com or via phone at 210.531.5518.