GROWTH PLAN

TIME PERIOD	ACTIVITY
MONTH 1 (2026 - FEB)	**1) Set Up** a) Complete Buyer Persona Review b) Set up and Optimize HubSpot for the following: i) Lead scoring (Needs Professional version) ii) Nurturing campaigns iii) Reporting iv) CTAs v) Dashboards vi) Segmentation of Lists by Persona and Buyer's Journey **2) Website** a) Begin Optimization of the Website for This involves: i) ROI Calculator iii) Implementing the ux/ui changes from the analysis **3) Landing Pages** a) Creation and Optimization of Landing Pages i) CTAs ii) Best Practices iii) Persona Specific **4) Campaigns** a) Begin 1st demand generation program i) Begin first E-book (35 page minimum) b) Hevacomp Omnichannel marketing campaign. Create the following: ● Hevacomp product comparison infographic ● Landing page for the Hevacomp infographic ● Email for when they download the infographic ● Nurturing Campaign ● Obtain Testimonials/Case Studies (separate campaign is needed) ● Open Building product comparison infographic ● Landing page for the Open Building infographic ● Email for when they download the infographic ● Nurturing Campaign c) Determine the Elements of an ROI Calculator and Build **5) Blogs** a) Create 5 blog posts **6) Social Media** a) Optimize Social Media Platforms **7) Videos** a) Create a top-of-funnel explainer video **8) Reporting** a) Set up Scorecard and KPIs

	9) Sales Enablement a) Set up Sales/Marketing Structured Interface b) Teaser for cooling load release - per request
MONTH 2 (2026_ - MAR)	**1) Website** a) Complete website redesign for the US market **2) Campaigns** a) Complete the 1st E-book i) Create: ● landing pages ● nurturing campaign (emails with unique content based on the E-book) ★ One Infographic ★ One 2-4 Page guide ★ One Checklist ★ One - One-pager ★ What the Experts are Saying (testimonials) ★ ROI Calculator ★ One Case Study ★ 2 Videos (30 - 90 Seconds) ○ One benefit/feature-based ○ one technical ii) Rollout 1st demand generation program b) New Product Release for Radient Heat i) There will be an omnichannel social media release ii) There will be a PR announcement release ● Structure for AI optimization Q/A section iii) There will be an associated nurturing campaign iv) Elements ● Blog ● Social Posts ● 2-4 Page Guide ● Infographic ● One-pager ● Site page ● Explainer Videos ● Draft and send out prospect/nurture email ● Draft and send out customer-facing email - usage-focused ● Customer-facing in-app messages v) Rollout Radient Heat Campaign c)Buyers' Guide for MEP Software ● Blog ● Social Posts ● 2-4 Page Guide ● Infographic ● Site page **3) Blogs**

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- **Production of long-form blogs each MWF once the website is completed**
- **See the list of recommended blogs**
- **Total of 13 blogs in the second month**
- **Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram**
- **Blog Commitment**
  - **Andrew (4 per month) (Sales/Industry Issues)**
  - **Daniel**
  - **Bill**
  - **New Content Writer**
  - **Jordan? (Technical)**
  - **Jonny? (Technical)**
  - **Damon?**
  - **Others?**

4) Videos

a) **Begin a video series where Jonny/Jordan**

i) each one to produce one video per week

- Low Production - Informal Approach

ii) **Create an explainer video for HVAC and Plumbers**

- A short form (120 seconds or less) top-of-the-funnel entertaining awareness video designed to explain the value proposition of h2x in an easily-digestable and compelling way

5) Social Media

a) Daily Omni-channel social posts pulled from above

i) The schedule above represents material for over 33 of the 22 business days

6) Third-Party Verification Sites

a) **Optimize listings** for Capterra, Software Advice, and GetAPP

7) Influencer Marketing

a) **Obtain 5 testimonials**

i) Need contact/intro from sales

ii) Website, nurturing, 3rd party referral sites

iii) 3 video testimonials

b) **2 case studies**

i) Need contact/info from sales

ii) Website and downloadable PDF

8) SEO Optimization

a) **eliminate high-risk backlinks**

i) 355 Toxic backlinks

ii) 38 potential toxic

iii) 109 broken

9) GEO Optimization

a) **Create a Q/A structured content**

b) Publish in

i) Reddit

ii) LinkedIn

	iii) blog c) Generate Reddit Questions/Answers 10) Paid Demand a) Test Competitor Branded Keywords b) Amplify Content that is working well organically
MONTH 3 (2026 - APR)	1) Website a) Set up a heat map on the website to analyze performance i) A/B Test Optimization based on engagement ii) Main Page and Product Pages 2) Landing Pages a) Set up a heat map on the landing pages to analyze performance b) A/B Test Optimization based on engagement 3) Campaigns a) Begin Development of 2nd Demand Generation eBook - (35 page minimum) i) Working Titles: • The Fundamentals of Radiant Floor Heating: Principles, Benefits, and Applications • Accurate Heat Loss Calculations: Methods, Tools, and Common Pitfalls • Laying Out the Radiant Heating Grid: Best Practices and Design Strategies • Automating Design Changes: How Modern Software Handles Recalculations and Reconfigurations b) New Product Release for Cooling Load i) Prepare • Blog • Social Posts • 2-4 Page Guide • Infographic • One-pager • Site page • Explainer Videos • Send PR release - structure for AI optimization • Draft and send out prospect/nurture email • Draft and send out the customer-facing email - usage-focused • Customer-facing in-app messages c) ROI Calculator Rollout • Blog • Social Posts • Site Page • Send PR release - structure for AI optimization • Draft and send out prospect/nurture email d) h2x university • Blog • Social Posts • 2-4 Page Guide • Infographic • One-pager

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- Site page
- Explainer Videos
- ?Send PR release - structure for AI optimization

4) Blogs

a) Production of long-form blogs each MWF once the website is completed
b) See the list of recommended blogs
c) Total of 13 blogs in the third month
d) Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram

5) Video Series

a) Continue weekly video series for Jordan/Jonny
b) Begin videos with Andrew 2 per month

6) Social Media

a) Daily Omni-channel social posts pulled from above
i) The schedule above represents material for 33 of the 22 business days

7) Third-Party Verification Sites

b) Optimize listings for G2 Crowd, SourceForge, and Trust Radius

8) Influencer Marketing

a) Obtain 5 testimonials
i) Need contact/intro from sales
ii) Website, nurturing, 3rd party referral sites
iii) 3 video testimonials
b) 2 case studies
i) Need contact/info from sales
ii) Website and downloadable PDF

9) SEO Optimization

a) Secure 5 high-value backlinks

10) GEO Optimization

a) Create 2nd Series of Q/A structured content
b) Publish in
i) Reddit
ii) LinkedIn
iii) blog
c) Generate Reddit Questions/Answers

11) Sales Enablement

a) Create Battle Cards for each competitor
b) Create an Infographic comparison sheet

12) ABM

a) Identify 5 companies and contacts for the 1st ABM initiative
i) Austin has a list of 50 high-value companies
b) Repurpose month 2 collateral for ABM Initiative

13) Paid Demand

a) Test Retargeting of Visitors

	a) Amplify Content that is working well organically
Month 4 (2026 - May)	**1) Website** a) Continue heat map analysis and optimization **2) Landing Pages** a) Continue heat map analysis and optimization **3) Campaigns** a) Complete 2nd Demand Generation eBook i) Create: ● landing pages ● nurturing campaign (emails with unique content based on the E-book) ★ One Infographics ★ One 2-4 Page guide ★ One Checklists ★ One - One-pagers ★ What the Experts are Saying ★ ROI Calculator ★ One Case Study ★ 2 Videos (30 - 90 Seconds) ○ One benefit/feature-based ○ one technical ii) Release 2nd Demand Generation e-book b) New Product Release - TBD i) Prepare ● Blog ● Social Posts ● 2-4 Page Guide ● Infographic ● One-pager ● Site page ● Explainer Videos ● Send PR release - structure for AI optimization ● Draft and send out prospect/nurture email ● Draft and send out customer-facing email - usage-focused ● Customer-facing in-app messages c) Establish an Official Referral Program i) “Refer a Friend” - Targeted to existing customers Blog ● Social Posts ● Site page ● Send PR release - structure for AI optimization ● Draft and send out customer-facing email - usage focused ● Customer-facing in-app messages **4) Blogs**

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	a) Production of long-form blogs each MWF once the website is completed b) See the list of recommended blogs c) Total of 13 blogs in the third month Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram **5) Video Series** a) Continue weekly video series for Jordan/Jonny b) Continue videos with Andrew 2 per month **6) Social Media** a) Daily Omni-channel social posts pulled from above i) The schedule above represents material for 33 of the 22 business days **7) Third-Party Verification Sites** a) Optimize listings for TopBusinessSoftware, SaaSHub, SaaSWorthy **8) Influencer Marketing** a) Obtain 5 testimonials i) Need contact/intro from sales ii) Website, nurturing, 3rd party referral sites iii) 3 video testimonials b) 2 case studies i) Need contact/info from sales ii) Website and downloadable PDF **9) SEO Optimization** a) Secure 5 high-value backlinks **10) GEO Optimization** a) Create 3rd Series of Q/A structured content b) Publish in i) Reddit ii) LinkedIn iii) blog c) Generate Reddit Questions/Answers **11) Sales Enablement** a) Create collateral for Sales Sequences **12) ABM** a) Rollout 1st ABM initiative **13) Webinars** a) Begin the development of a monthly webinar series ● Must be educational/informational ● With the guest influencers to target the same personas and have a list ○ Monthly Tips and Tricks ○ New Product Releases ○ Co-branded with Infuencer/Associations **14) Paid Demand** a) Evaluate the co-branded email option i) Typically $5k-7K

	ii) Guaranteed Performance Results b) Amplify Content that is working well organically
Month 5 (2026 - June)	**1) Website** a) Continue heat map analysis and optimization b) Create 1 Product Page Videos i) Not technical but benefit/feature based **2) Landing Pages** a) Continue heat map analysis and optimization **3) Campaigns** a) Begin 3rd Demand Generation eBook - (35 page minimum) i) Working Titles - • The Modern Engineer's Playbook: Maximizing Profitability Through Design Automation b) New Product Release - TBD i) Prepare • Blog • Social Posts • 2-4 Page Guide • Infographic • One-pager • Site page • Explainer Videos • Send PR release - structure for AI optimization • Draft and send out prospect/nurture email • Draft and send out customer-facing email - usage-focused • customer-facing in-app messages c) Wake The Dead Campaign i) Designed to revive old leads that failed to engage ii) Determine three main reasons and set a campaign to address them iii) Possibly incentive-based (e.g., extra training, etc.) • Blog • Social Posts • Infographic • email **4) Blogs** a) Production of long-form blogs each MWF once the website is completed b) See the list of recommended blogs c) Total of 13 blogs in the third month Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram **5) Video Series** a) Continue weekly video series for Jordan/Jonny b) Continue videos with Andrew 2 per month c) See Sales Enablement section d) See Website **6) Social Media**

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	a) Daily Omni-channel social posts pulled from above i) The schedule above represents material for 33 of the 22 business days **7) Third-Party Verification Sites** a) Meet with Capterra, Software Advice, and GetApp about the referral program i) They have both a pay-to-play and an organic program **8) Influencer Marketing** a) Obtain 5 testimonials i) Need contact/intro from sales ii) Website, nurturing, 3rd party referral sites iii) 3 video testimonials b) 2 case studies i) Need contact/info from sales ii) Website and downloadable PDF **9) SEO Optimization** a) Secure 5 high-value backlinks **10) GEO Optimization** a) Create the 4th Series of Q/A structured content b) Publish in i) Reddit ii) LinkedIn iii) blog c) Generate Reddit Questions/Answers **11) Sales Enablement** a) Create 80% video - What questions do you get on every sales call **12) ABM** a) Identify 5 companies and contacts for the 2nd ABM initiative b) Repurpose the best converting collateral from previous months **13) Webinars** a) Roll out Webinar Series **14) Paid Demand** a) If a high-performing asset, run a co-branded email option b) Evaluate pay-for-play from referral sites c) Amplify Content that is working well organically **15) Evaluate Co-marketing Initiatives with the Major Engineering Associations**
Month 6 (2026 - July)	**1) Website** a) Continue heat map analysis and optimization b) Create 1 Product Page Videos **2) Landing Pages** a) Continue heat map analysis and optimization **3) Campaigns** a) Complete and Release 3rd Demand Generation eBook i) Create: • landing pages • nurturing campaign (emails with unique content based on the E-book) ★ One Infographics

	★ One 2-4 Page guide ★ One Checklists ★ One - One-pagers ★ What the Experts are Saying ★ ROI Calculator ★ One Case Study ★ Video **b) <u>New Product Release - TBD</u>** **i) Prepare** ● Blog ● Social Posts ● 2-4 Page Guide ● Infographic ● One-pager ● Site page ● Explainer Videos ● Send PR release - structure for AI optimization ● Draft and send out prospect/nurture email ● Draft and send out customer-facing email - usage-focused ● Customer-facing in-app messages **c) <u>Establish an Outreach Engagement with Local Industry Associations</u>** **i) Offer to provide educational/informational programs for their monthly meeting** **ii) Start with associations that are "local" and then work on remote opportunities** ● Blog ● Social Posts ● One-pager ● Site page ● Send PR release - structure for AI optimization ● Draft and send out prospect/nurture email ● Draft and send out customer-facing email - usage-focused ● Customer-facing in-app messages **<u>4) Blogs</u>** **a) Production of long-form blogs each MWF once the website is completed** **b) See the list of recommended blogs** **c) <u>Total of 14 blogs</u> in the third month** **Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram** **<u>5) Video Series</u>** **a) Continue weekly video series for Jordan/Jonny** **b) Continue videos with Andrew 2 per month** **c) See Sales Enablement section** **d) See Website** **<u>6) Social Media</u>** **a) Daily Omni-channel social posts pulled from above**

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	i) The schedule above represents material for 33 of the 22 business days **7) Third-Party Verification Sites** a) Meet with G2 Crowd, SourceForge, and Trust Radius about the referral program **8) Influencer Marketing** a) Obtain 5 testimonials i) Need contact/intro from sales ii) Website, nurturing, 3rd party referral sites iii) 3 video testimonials b) 2 case studies i) Need contact/info from sales ii) Website and downloadable PDF **9) SEO Optimization** a) Secure 5 high-value backlinks **10) GEO Optimization** a) Create the 5th Series of Q/A structured content b) Publish in i) Reddit ii) LinkedIn iii) blog c) Generate Reddit Questions/Answers **11) Sales Enablement** a) Create customer journey videos **12) ABM** a) Rollout 2nd ABM initiative **13) Webinars** a) Produce month 2 of the Webinar Series **14) Paid Demand** a) Run a LinkedIn Targeted Campaign b) Evaluate pay-for-play from referral sites a) Amplify Content that is working well organically **15) Begin to establish a partner program** a) Establish program elements b) Develop collateral and landing page c) Identify prospective partners
Month 7 (2026 August)	**1) Website** a) Continue heat map analysis and optimization b) Create 1 Product Page Videos **2) Landing Pages** a) Continue heat map analysis and optimization **3) Campaigns** a) Begin 4th Demand Generation eBook - (35 page minimum) i) Working Titles - The Secrets to How Engineering Service Companies Optimize Profitability, Accuracy, and Operational Efficiencies b) New Product Release - TBD i) Prepare

- **Blog**
- **Social Posts**
- **2-4 Page Guide**
- **Infographic**
- **One-pager**
- **Site page**
- **Explainer Videos**
- **Send PR release - structure for AI optimization**
- **Draft and send out prospect/nurture email**
- **Draft and send out customer-facing email - usage-focused**
- **Customer-facing in-app messages**

c) <u>Implement a co-marketing webinar campaign with a major Engineering Association</u>

i) Prepare

- **Blog**
- **Social Posts**
- **2-4 Page Guide**
- **Infographic**
- **One-pager**
- **Site page**
- **Send PR release - structure for AI optimization**
- **Draft and send out prospect/nurture email**
- **Draft and send out customer-facing email - usage focused**
- **Customer-facing in-app messages**

<u>4) Blogs</u>

a) Production of long-form blogs each MWF once the website is completed
b) See the list of recommended blogs
c) Total of 13 blogs in the third month
Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram

<u>5) Video Series</u>

a) Continue weekly video series for Jordan/Jonny
b) Continue videos with Andrew 2 per month
c) See Sales Enablement section
d) See Website section

<u>6) Social Media</u>

a) Daily Omni-channel social posts pulled from above
i) The schedule above represents material for 33 of the 22 business days

<u>7) Third-Party Verification Sites</u>

a) <u>Meet with TopBusinessSoftware, SaaSHub, and SaaSWorthy about the referral</u> program

<u>8) Influencer Marketing</u>

a) Obtain 5 testimonials
i) Need contact/intro from sales
ii) Website, nurturing, 3rd party referral sites
iii) 3 video testimonials

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	b) 2 case studies **i) Need contact/info from sales** **ii) Website and downloadable PDF** **9) SEO Optimization** **a) Secure 5 high-value backlinks** **10) GEO Optimization** **a) Create the 6th Series of Q/A structured content** **b) Publish in** **i) Reddit** **ii) LinkedIn** **iii) blog** **c) Generate Reddit Questions/Answers** **11) Sales Enablement** **a) Create Expert Snippets videos** **12) ABM** **a) Identify 5 companies and contacts for the 3rd ABM initiative** **b) Repurpose the best converting collateral from previous months** **13) Webinars** **a) Produce month 3 of the Webinar Series** **14) Paid Demand** **a) Co-marketing with Industry Association** **b) Amplify Content that is working well organically** **15) Develop a client retention program** **a) Unique monthly content** **b) Unique monthly webinar** **c) Monthly temperature-taking meetings**
Month 8 (2026- Sept)	**1) Website** **a) Continue heat map analysis and optimization** **b) Create 1 Product Page Videos** **2) Landing Pages** **a) Continue heat map analysis and optimization** **3) Campaigns** **a) Complete and Release 4th Demand Generation eBook** **i) Create:** • **landing pages** • **nurturing campaign (emails with unique content based on the E-book)** ★ **One Infographics** ★ **One 2-4 Page guide** ★ **One Checklists** ★ **One - One-pagers** ★ **What the Experts are Saying** ★ **ROI Calculator** ★ **One Case Study** ★ **Video** **b) New Product Release - TBD**

	i) Prepare ● **Blog** ● **Social Posts** ● **2-4 Page Guide** ● **Infographic** ● **One-pager** ● **Site page** ● **Explainer Videos** ● **Send PR release - structure for AI optimization** ● **Draft and send out prospect/nurture email** ● **Draft and send out customer-facing email - usage focused** ● **Customer-facing in-app messages** **c) <u>Design/Build Contractor Initiative</u>** **i) Prepare** ● **Blog** ● **Social Posts** ● **2-4 Page Guide** ● **Infographic** ● **One-pager** ● **Site page** ● **Explainer Videos** ● **Send PR release - structure for AI optimization** ● **Draft and send out prospect/nurture email** ● **Draft and send out customer-facing email - usage focused** ● **Customer-facing in-app messages** **<u>4) Blogs</u>** **a) Production of long-form blogs each MWF once the website is completed** **b) See the list of recommended blogs** **c) Total of 13 blogs in the third month** **Every blog is distributed by using all social media channels, including LinkedIn Feed, LinkedIn Groups, individual team members' feed, X, Facebook, and Instagram** **<u>5) Video Series</u>** **a) Continue weekly video series for Jordan/Jonny** **b) Continue videos with Andrew 2 per month** **c) See Website section** **<u>6) Social Media</u>** **a) Daily Omni-channel social posts pulled from above** **i) The schedule above represents material for 33 of the 22 business days** **<u>7) Third-Party Verification Sites</u>** **a) Continued optimization of sites and referral programs** **<u>8) Influencer Marketing</u>** **a) Obtain 5 testimonials** **i) Need contact/intro from sales** **ii) Website, nurturing, 3rd party referral sites**

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	iii) 3 video testimonials b) 2 case studies i) Need contact/info from sales ii) Website and downloadable PDF **9) SEO Optimization** a) Secure 5 high-value backlinks **10) GEO Optimization** a) Create the 7th Series of Q/A structured content b) Publish in i) Reddit ii) LinkedIn iii) blog c) Generate Reddit Questions/Answers **11) Sales Enablement** a) Redo Wake the Dead Initiative **12) ABM** a) Rollout 3rd ABM initiative **13) Webinars** a) Produce month 4 of the Webinar Series **14) Paid Demand** a) Review local Association programs for implementation b) Amplyfy Content that is working well organically **15) Begin to establish a partner program** a) Implement the partner program **16) Develop a client retention program** a) Implement the client retention program
Month 9 (2026 - Oct))	**TBD**
Month 10 (2026- Nov)	**TBD**
Month 11 (2026 - Dec)	**TBD**
Month 12 (2027 – Jan)	**TBD**