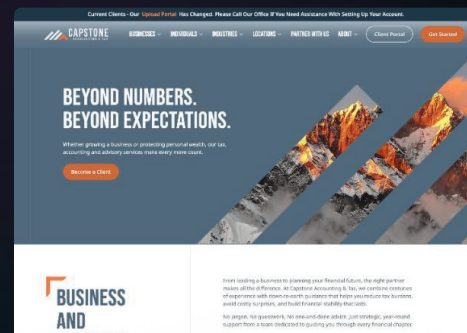


CLIENT SPOTLIGHT

From Acquisition-Led Growth to a Multi-Channel Revenue Engine

CLIENT	INDUSTRY	STARTED	SCALE	ENGAGEMENT
Capstone Accounting & Tax	CPA & Advisory	2004 · Oregon	12+ Locations, 6 States	Full Growth System



4.82x
SEO ROI

137
Clients Signed

\$184K
New Revenue, All Channels

\$218
Cost per Signed Client (SEO)

THE CHALLENGE

A Firm Built to Acquire — But Not to Grow Organically

When Capstone Accounting & Tax partnered with WISE, they had built an impressive multi-location firm through strategic acquisitions — but organic growth was a blind spot.

Their digital presence was fragmented, their previous marketing efforts had no measurable impact, and they had no reliable engine for attracting the high-value clients they actually wanted.

No digital growth engine

Organic growth was entirely referral-dependent. Digital marketing had been minimal — not a priority due to limited bandwidth and resources.

Fragmented legacy website

Their own team described it as "incohesive, wordy, outdated, and piece-mealed" — it couldn't support the firm they were becoming.

No reliable ads partner

Previous Google LSA campaigns brought in low-quality leads with poor targeting. No ad investment was producing consistent, measurable returns.

Ineffective SEO strategy

They had worked with other partners on SEO before. None of it moved the needle — no trackable revenue, no measurable ROI.

BRAND & WEBSITE TRANSFORMATION

Rebuilt from the Ground Up

The old site reflected a firm that had grown by stitching pieces together. The new one was built to reflect where Capstone is going — a premium, multi-state advisory firm targeting high-value business owners and individuals.

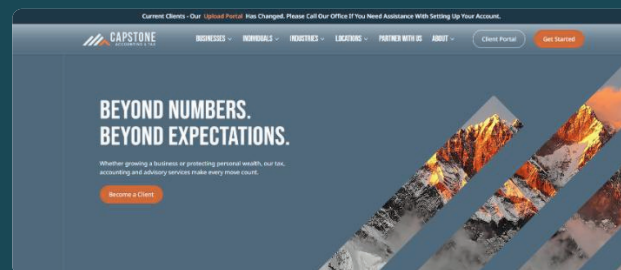
BEFORE



The Old Capstone Site

- Incohesive messaging and formatting issues
- Wordy, outdated, and piece-mealed together
- No clear calls-to-action or service distinctions
- Couldn't support 12+ locations or expansion

AFTER



capstoneaccounting.com

- Clean, premium brand: "Beyond Numbers. Beyond Expectations."
- Built for multi-state scale across 12+ locations and beyond
- Clear service architecture for businesses and individuals
- Conversion-focused with structured intake and CTAs

THE SOLUTION

WISE Growth System: Position → Attract → Convert

Each component addressed a specific growth gap, working together to build the first true organic growth engine Capstone had ever operated.

STEP 01

Position

Solves: No differentiated brand or digital presence

Clarified positioning around proactive, year round advisory services rather than transactional tax work. Refined firm messaging, brand narrative, and digital presence to support growth and attract business clients.

Capstone now presents as a premium regional firm, not a collection of local offices.

STEP 02

Attract

Solves: No measurable digital lead flow

SEO strategy targeting high-intent searches across all markets. Google Ads rebuilt from scratch — moving away from LSA to targeted campaigns. Listings management across all locations.

137 signed clients across SEO and paid channels — from zero trackable digital clients prior.

STEP 03

Convert

Solves: Poor lead quality and no intake system

Website built for conversion with clear CTAs and location-based routing. Prospective client intake process structured to qualify leads before they reach CPAs — saving time and improving fit rate.

Good lead-to-signed-client conversion rate of 93% on SEO — the channel attracting the highest-quality prospects.

THE RESULTS

Channel-by-Channel Performance



ORGANIC SEARCH (SEO)

4.82x

ROI on SEO investment

\$78,890

Revenue from signed clients

75

Clients signed

\$218

Cost per signed client

SEO LTV projection: 18.07x ROI as clients are retained over time



PAID SEARCH (GOOGLE)

0.51x

Current ROI (Year 1)

\$21,940

Revenue from signed clients

23

Clients signed to date

94

Leads still in pipeline

LTV projection: 2.32x ROI as pipeline closes and clients are retained.



ALL CHANNELS COMBINED

1.70x

Blended ROI — Year 1

\$184,123

Total revenue, all channels

137

Total clients signed

\$295K

Projected LTV revenue

94 pipeline leads not yet counted. Full pipeline conversion would push blended ROI well above current figures.

WHAT'S NEXT

The Road Ahead



Optimizing Paid Search ROI

Paid is in early-stage optimization with 94 leads still in pipeline. Continued refinement targets a 2.32x+ LTV return as campaigns mature.



Expanding to New Markets

Capstone is actively acquiring new firms or setting up new locations across the Pacific Northwest and beyond — each new market gets a full local SEO and digital presence built on the same system.



Shifting Mix Toward High-Value Services

With the growth engine now running, Capstone is focused on attracting more Business Tax Planning and CAS clients — their highest-margin, most strategic work.

Ready to Build Your Growth Engine?

See how the WISE Growth System™ can create your firm's first reliable digital client acquisition channel.

