

## MODULE 10 LESSON NOTES

## COMPLIANCE & CERTIFICATION

### REPRESENT AMERICAN MARKETING ACCURATELY.

Compliance is simple: be accurate, be professional, protect the brand, document your work honestly, and never promise what you can't control.

#### ACCURATE REPRESENTATION

- Don't invent services, pricing, discounts, capabilities, or offers.
- New clients currently begin with Meta advertising through Facebook and Instagram.
- Additional services may be added later after the Meta system is working and the economics justify expansion.
- If you are unsure, say: "I want to confirm that for you."

#### IDENTITY RESOLUTION

Explain identity resolution as technology that helps improve targeting toward more relevant audiences and people showing buying intent.

##### STAY ACCURATE

Don't claim we know with certainty who will buy. Better targeting is the goal - not a guarantee.

#### NO GUARANTEES

- Don't guarantee leads, customers, revenue, profit, ROI, search rankings, or consultant earnings.
- We control our work, not every variable inside the client's business.
- Explain what we do provide: execution, measurement, accountability, and continuous improvement.

#### MARKETING SCORE

The Marketing Score helps evaluate the broader client marketing system and creates an ongoing feedback loop.

- Campaign performance and targeting
- Conversions and website performance
- Online reputation and reviews
- Lead handling, friction, and follow up

#### THE OPERATING STANDARD

##### EXECUTE

Do the work.

##### MEASURE

Track what happens.

##### IDENTIFY

Find the problem.

##### ADJUST

Improve the system.

##### VERIFY

Ask when unsure.

#### PROFESSIONAL CONDUCT

- Don't harass prospects or create fake urgency.
- Don't pretend someone expects your call when they don't.
- Don't make false claims about competitors.
- If someone says not to contact them again, stop.

#### DASHBOARD + DOCUMENTATION

- Use approved scripts, variable questions, and email templates.
- Customize when appropriate without adding false claims or guarantees.
- Record legitimate prospect activity accurately.
- Don't falsify notes, enter fake opportunities, or manipulate attribution.

#### PROTECT THE COMPANY

Protect private client and prospect information, internal systems, scripts, training materials, pricing, and login credentials. Use approved logos, company descriptions, and materials. If the answer matters and you aren't sure, ask.

#### KEY TAKEAWAY

**BUILD RELATIONSHIPS. CREATE VALUE. BUILD INCOME.**  
**CERTIFICATION MEANS YOU UNDERSTAND THE SYSTEM AND THE STANDARD.**