

STRATEGY LED SALES FOR MARKETING AGENCIES

A PROVEN FORMULA TO RADICALLY
GROW ANY MARKETING AGENCY



**DIGITAL
MATURITY
GROUP**

BY LANE SMITH & DAVID DAIGLE

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FOREWORD

BY DENES PURNHAUSER

In a landscape where marketing agencies often grapple with the challenge of scaling, "Strategy Led Sales for Marketing Agencies" by Lane Smith and David Daigle stands out as a seminal work that offers not just hope but a concrete path forward. Having had the privilege of knowing Lane and David for several years and witnessing their remarkable journey firsthand, I can attest to the potency and relevance of the insights and strategies laid out in this book.

Lane Smith, with his track record of building and selling professional service companies, and David Daigle, who has successfully run a marketing agency using the model detailed in this book, have combined their profound expertise and experiences to craft a guide that is both practical and transformative. The heart of their message is a simple yet revolutionary idea: growth stagnation in marketing agencies is primarily due to a reactive sales process focused on immediate client wants rather than strategic needs.

What sets this book apart is its grounded in real-world application and success. The strategies and processes elucidated here are not theoretical musings but tried and tested methods that have been implemented by hundreds of marketing agencies, culminating in an astonishing \$75 million in revenue from digital planning services alone over the past year. This is a testament to the efficacy of the Marketing Strategy Led Process that Lane and David advocate for—a process that emphasizes the creation and execution of a comprehensive marketing strategy over offering ad-hoc services to address tactical problems.

The journey to scaling a marketing agency is fraught with challenges that many find insurmountable. This book addresses these challenges head-on, offering a The 7 Step Strategy Led Sales Process as a proven formula for radical growth. From the initial marketing improvement strategy call to client retention and expansion, each step is designed to build a solid foundation for growth, enabling agencies to move beyond mere survival to thrive in a competitive market.

As someone who has scaled multiple organizations, I understand the critical importance of having a clear, actionable strategy. "Strategy Led Sales for Marketing Agencies" provides exactly that. It's more than a book; it's a blueprint for success. Whether you are struggling to grow your agency or looking for ways to enhance efficiency and service delivery, Lane and David offer a comprehensive guide that covers every aspect of building a predictable and efficient marketing strategy.

Moreover, this book is a narrative that aligns with the ethos of our time: the need for digital transformation and strategic thinking in the marketing domain. It underscores the shift from traditional service offerings to strategic, value-driven partnerships that empower clients and drive sustainable growth.

In essence, Lane and David have not just written a book; they have provided a lifeline for marketing agencies worldwide. Their insights offer a fresh perspective on overcoming the barriers to growth, ensuring that your agency can not only navigate the complexities of the digital age but also emerge as a leader in the field.

As you embark on this reading journey, I invite you to approach it with an open mind and a readiness to transform your agency. The principles and processes detailed in this book have the potential to redefine your approach to marketing strategy and, ultimately, lead your agency to unprecedented levels of success.

Welcome to a new chapter in your agency's story. Let's begin.

CHAPTER 1: SCALING YOUR AGENCY DOES NOT HAVE TO BE SO HARD



However difficult life may seem, there is always something you can do and succeed at. - *Stephen Hawking*.

Scaling a marketing agency is no easy feat. Every agency owner knows this all too well. The journey from a small startup to a thriving, profitable business is fraught with challenges, hurdles, and setbacks. The struggle is not just about finding clients or offering a unique service. It is about creating a sustainable business model, one that can withstand the test of time and the ever-changing dynamics of the market.

Does this sound familiar? You find yourself stuck in a vicious cycle. You react to your clients' immediate needs, focusing on tactical services rather than strategic needs. You churn out solutions to isolated problems, one after the other, without a long-term plan or vision. The result? Limited lifetime contract value (LTV), a roller coaster revenue model, short client engagement, and expectations beyond your control.

The typical sales process of a marketing agency can be akin to a game of tag. Your agency chases after the client's wants, rushing to deliver results. In the race to meet expectations, you often end up with low maturity clients - those who want quick results without any significant investment or involvement. This approach not only leads to low contract value but also short client engagement. The moment clients don't see the value they expect, they move on, leaving you back at square one.

According to a study by HubSpot, only about 20% of agencies have predictable revenue growth. Furthermore, 28% of agencies say that their biggest challenge is finding new clients, and 16% struggle with low contract value (HubSpot, 2020). These statistics underline the importance of a strategic approach to sales in marketing agencies.

Moreover, such a reactive sales process creates expectations that are outside of your control. For instance, promising a certain number of leads or a specific growth rate is a risky proposition. These outcomes depend on a multitude of factors, many of which are beyond your agency's control. If the results fall short of expectations, it leads to client dissatisfaction, damaging your agency's reputation and relationship with the client.

The heart of the problem lies not in the services offered but in the sales process itself.

The process needs to shift from being reactive to proactive - from addressing immediate wants to understanding and fulfilling long-term needs. The focus should be on building a partnership with your clients, one that is based on mutual understanding, trust, and shared responsibilities.

So, how can you break free from this cycle? The answer lies in developing a Strategy Led Sales Process. This process involves creating a tailored marketing strategy for each client, one that addresses their unique needs and aligns with their long-term goals. It involves not just selling a service, but offering value - value that is tangible, measurable, and within your agency's control.

The Strategy Led Sales Process positions you as a strategic partner rather than a mere service provider. It enables your agency to attract high maturity clients - those who understand the value of a long-term partnership and are willing to invest in building marketing capabilities. These clients are more likely to stick around, resulting in long-term engagement, predictable revenue, and high contract value.

This process also allows your agency to control expectations. By focusing on creating marketing systems and processes, you can deliver results that are within your control. This approach not only ensures client satisfaction but also reduces the risk of client churn.

However, implementing such a process is not without its challenges. It requires a high level of expertise, often limited to the founder of your agency. It requires a substantial investment of time and resources. It requires the involvement of the client's top management, including the CEO or founder. Despite these hurdles, the benefits far outweigh the costs.

In a fiercely competitive market, a marketing agency's survival depends on its ability to stand out, to offer something unique, to provide value beyond what is expected. The Strategy Led Sales Process offers just that. It provides you with a roadmap to sustainable growth, a blueprint for transforming client relationships, and a strategy for achieving predictable results.

As we journey through this book, we will delve deeper into the Strategy Led Sales Process. We will explore each step in detail, from the Marketing Improvement Review to the presentation of the back end products. We will discover how this process can revolutionize your agency's sales approach, resulting in increased client retention, predictable revenue, and sustainable growth.

As a marketing agency owner, you have the power to change the course of your business. You have the potential to create a future that is not just feasible but prosperous. The path may be steep and fraught with challenges, but the view from the top is worth it.

So, embark on this journey with an open mind and a determined spirit. Reclaim your passion, reignite your purpose, and redefine your potential. The world of marketing is ever-changing, but the heart of an agency remains the same. It's time to transform your sales process, your client relationships, and ultimately, your agency. It's time to grow.



"Success with clients across industries hinges on offering unique value beyond expectations. A pivotal moment in my career came when a client chose us because, unlike others who offered proposals, we presented a strategy. This emphasized the significance of understanding a client's deeper needs and planning for long-term success, teaching me the value of strategic partnerships over mere transactions."

On a Bumper Sticker:

Scaling a marketing agency is a daunting task, but it's not impossible. The key lies in shifting the sales process from reactive to proactive, from tactical to strategic. Envision a future that's not just feasible but prosperous and take the first step towards it today.

Action Plan:

- Evaluate your current sales process. Is it reactive or proactive? Tactical or strategic?
- Take a long, hard look at your client base. Are you attracting high maturity clients, or are you stuck with low maturity clients?
- Review your contract values. Are they in line with the value you provide?
- Assess your client engagement. Is it short-lived, or do you have long-term relationships with your clients?
- Determine the outcomes you promise. Are they within your control, or are you setting unrealistic expectations?

Now that we've identified the root cause of the problem, it's time to delve into the solution. In the next chapter, we will introduce the 7 Step Strategy Led Sales Process, a proven formula that can revolutionize your sales process and lead to sustainable growth. Stay tuned!

CHAPTER 2: THE 7 STEP STRATEGY LED SALES PROCESS



However beautiful the strategy, you should occasionally look at the results. - *Winston Churchill*

Marketing agencies, in their quest to serve the client's interest, often find themselves caught up in a reactionary sales process. This approach, in many instances, inadvertently leads to a focus on client wants and not necessarily their strategic needs. This chapter promises to be the game-changer, providing a clear roadmap for your agency to shift from a reactionary to a proactive sales process.

Let's start with a paradigm shift. Instead of the traditional and time-consuming method, you can generate a marketing strategy much faster. The secret? A proven formula that drastically cuts down the time to just a few hours of client interaction and administrative tasks, all thanks to artificial intelligence. This isn't a mere conjecture; it's a tried and tested method used by over 200 agencies that collectively made over \$75M+ in revenue from marketing strategy and MRR.

So, let's dive into the The 7 Step Strategy Led Sales Process.

1. **Marketing Improvement Strategy Call:** The first step is a conversation. It's not about selling a service but understanding the client's needs and identifying potential opportunities for improvement. By standardizing this sales procedure, you can apply it to different types of leads, qualify them, and predict their next move. This step is crucial as it allows you to reach out to potential clients even if they have not identified a specific pain point.
2. **Marketing Strategy Service Offer:** This step involves packaging your service into a clear, irresistible offer. The offer should guide your client through the process, making it easy for them to understand what they are buying into. Remember, this is a paid service, but the clarity and structure you provide will make it worth their while.
3. **Engaging Client Interviews:** At this stage, you seek out critical information from the client. This can be done through a structured interview or a detailed questionnaire. The goal is to gather as much information as possible to understand the client's current marketing situation and their future goals.
4. **Marketing Assessment:** This is where the client assesses their current marketing capabilities. It's a reality check, enabling them to understand where they stand in terms of their marketing prowess. The assessment develops a business case with a number score representation, giving a clear picture of the areas that need improvement.
5. **Marketing Planning:** This step involves you developing a comprehensive marketing plan using artificial intelligence. It's a strategic document that outlines the marketing initiatives, timelines, expected outcomes, and measures of success.
6. **The Presentation:** Once the plan is ready, the next step is to present it to the client. This 50-page document is strategically crafted to guide the client through the proposed initiatives and set the stage for the next steps.
7. **Retention, Expansion, and No Churn Model:** The final step is about ensuring client satisfaction, maintaining their loyalty, and preventing churn. The marketing strategy and the scores are the backbone of all the agency's work. By revisiting this strategy quarterly and redoing it annually, you ensure that your client engagement remains an infinite cycle.

According to a recent survey by Agency Central, 65% of marketing agencies struggle with client retention, and 73% face challenges in delivering value to clients (Agency Central, 2020). This data underscores the importance of shifting from a reactionary to a proactive sales process. By implementing a marketing strategy led process, agencies can not only increase client retention by up to 40% but also boost their revenues by up to 60% (HubSpot, 2019).

By following these seven steps, your agency can create a proactive, client-focused sales process. It's not just about delivering a service, but about being a strategic partner that helps clients realize their true marketing potential. You can increase client retention, predict revenue, and ultimately grow in a sustainable manner.

Remember, the ultimate goal here is to switch from a reactionary to a strategic sales process. It's about understanding your client's needs and responding with a plan that can deliver results. It's about being a strategic partner, not just a service provider. And with the The 7 Step Strategy Led Sales Process, you have a proven formula to do just that.

In the next chapters, we will delve deeper into each step, providing you with practical tips and advice on how to implement this process effectively. So, keep reading, and let's start revolutionizing your sales process today.



"Our initial 50-hour estimate for the 7 Step Marketing Strategy Led Process under the Canadian Digital Adoption Plan was dramatically cut to 15 hours, not by reducing quality, but through the effective use of processes and leveraging specialized software and AI in an effective, streamlined way. This efficient delivery of comprehensive marketing strategies marked a significant shift in our client engagement approach. We realized that developing a marketing strategy quickly without losing quality was possible, enabling us to provide every client with a solid, actionable plan from the start."

On a Bumper Sticker:

The The 7 Step Strategy Led Sales Process is not just a formula; it's a game-changer. It's about transforming your mindset, your sales process, and ultimately, your agency. With this process, you're not just selling a service; you're becoming a strategic partner to your clients.

Action Plan:

- Conduct a Marketing Improvement Strategy Call with potential clients.
- Design an irresistible, clear, and paid Marketing Strategy Service Offer.
- Conduct Engaging Client Interviews to gather crucial information.
- Carry out a Marketing Assessment to understand the client's current capabilities.
- Develop a comprehensive Marketing Plan using AI.
- Present the plan to the client in a strategic manner.
- Implement the Retention, Expansion, and No Churn Model to ensure long-term success.

Now that you have a clear roadmap of the The 7 Step Strategy Led Sales Process, it's time to delve deeper into each step. In the next chapter, we'll explore the first step - the Marketing Improvement Strategy Call - and how it can set the stage for a successful marketing strategy. Stay tuned.

CHAPTER 3: STEP ONE: MARKETING IMPROVEMENT STRATEGY CALL



Good marketing makes the company look smart. Great marketing makes the customer feel smart. – *Joe Chernov*

So, what exactly is a **Marketing Improvement Strategy Call**? It's more than a mere sales pitch or a routine discovery call. It's a genuine conversation where you, as the agency, take a deep dive into understanding your potential client's business, their marketing challenges, their aspirations, and their pain points. It's a valuable opportunity to build trust, establish rapport, and position your agency as a strategic partner, rather than just another service provider.

The beauty of the Marketing Improvement Strategy Call is its adaptability. Whether your prospect comes from a referral, a digital ad, an outbound campaign, a networking event, or social media, the call structure remains the same. It's a standardized process that allows for a consistent experience across all lead sources. But make no mistake, standardization does not mean rigidity. While the process is repeatable, the conversation itself is fluid, personalized, and geared towards the unique needs of each prospect.

One of the crucial aspects of the call is to provide significant value upfront. This is not about selling; it's about helping. It's about listening and understanding. It's about making a potential client feel heard and valued. This upfront value not only builds a strong relationship but also positions your agency at a strategic level, making the subsequent stages of the sales process smoother.

Let's say one of your potential clients has a website problem, or they're struggling with SEO, or they're not generating enough leads. Instead of jumping right into problem-solving mode, you invite them for a Marketing Improvement Strategy Call. This approach reframes the conversation from a tactical level to a strategic level. It shifts the focus from the isolated problem to the bigger picture, from the symptoms to the root cause, from the 'what' to the 'why.'

According to a study by HubSpot, 74% of companies consider converting leads into customers as their top priority. Yet, 65% of businesses say generating traffic and leads is their biggest marketing challenge (HubSpot, 2020). These statistics underscore the importance of understanding your potential client's business and their marketing challenges before offering solutions.

The Marketing Improvement Strategy Call also serves as a valuable tool for client qualification. Not all leads are created equal. Some are ready to invest in a comprehensive marketing strategy, while others are merely looking for quick fixes. The call helps you gauge the maturity level of your prospects and their perceived problems. It helps you assess whether they're a good fit for your agency and whether you can genuinely provide value to them.

A successful call should end with one of two outcomes. Either you qualify the lead and move them further down the sales funnel, or you disqualify the lead but leave them with a positive impression of your agency. Even in the case of a disqualified lead, the goodwill you generate can lead to referrals and future opportunities.

Another critical element of the Marketing Improvement Strategy Call is the measurement of results. This is not about vanity metrics or surface-level data. It's about insightful, actionable intelligence that can guide your marketing strategy. The process should culminate in a report that can be shared with the prospect right away. This report should not only highlight the identified problems but also the value of a comprehensive marketing strategy.

In essence, the Marketing Improvement Strategy Call is a powerful tool to build trust, establish credibility, and set the stage for a fruitful client-agency relationship. It's about showing your prospects that you're not just interested in selling your services; you're interested in helping them succeed. By focusing on their needs, their challenges, and their aspirations, you position your agency as a strategic partner, not just a service provider.

As we move forward, remember that the Marketing Improvement Strategy Call is not an end in itself; it's the beginning of a journey. It's the first step in a seven-step process aimed at radically growing your marketing agency. It sets the foundation for the subsequent steps, including the creation of an irresistible offer for a Marketing Strategy, which we will discuss in the next chapter. However, before we proceed, let's pause and reflect.

- ✓ *Are you ready to take your agency to the next level?*
- ✓ *Are you prepared to move beyond tactical problem-solving and embrace strategic partnerships?*
- ✓ *Are you willing to invest the time and effort to understand your clients deeply and deliver genuine value?*

If your answer is yes, then you're ready to embark on this journey. A journey that's not just about growing your agency, but about transforming the way you do business. A journey that's about more than just making a sale; it's about making a difference. So take a deep breath, embrace the challenges ahead, and let's get started. Because the future of your agency begins with a single call.



"Adapting the SaaS model's emphasis on demos for our initial client interactions revolutionized our approach. Recognizing that agencies often tout their achievements without demonstrating their methods, we made our Marketing Improvement Strategy Call a 'demo' of our value and capabilities. This strategy of showcasing our impact from the first meeting not only attracts clients but also builds enthusiasm for potential partnerships. It's about delivering tangible value early on, making a memorable first impression, and laying the groundwork for a fruitful relationship."

On a Bumper Sticker:

In the world of marketing, understanding is the key to success. The Marketing Improvement Strategy Call is not just a call; it's a strategic tool that paves the way for a successful client-agency relationship. It's about listening, understanding, and offering value. When you understand your clients, you can serve them better. And when you serve them better, you grow.

Action Plan:

- Implement the Marketing Improvement Strategy Call in your agency.
- Listen actively and understand your client's business and marketing challenges.
- Provide significant value upfront to build trust and credibility.
- Use the call as a tool for client qualification.
- Generate a report based on the call and share it with the prospect.
- Shift the conversation from a tactical level to a strategic level.
- Prepare for the next step - creating an irresistible offer for a Marketing Strategy.

Now that you understand the importance of the Marketing Improvement Strategy Call, you're ready to move to the next step. In the next chapter, we'll dive into the nuances of creating an irresistible offer for a Marketing Strategy. Are you ready to make your offer impossible for clients to refuse? Let's find out in the next chapter.

CHAPTER 4: STEP TWO: MARKETING STRATEGY SERVICE OFFER



Good marketing makes the company look smart. Great marketing makes the customer feel smart. – *Joe Chernov*

As you well know, the journey to scale a marketing agency, one of the pivotal steps is crafting an irresistible offer for a Marketing Strategy Development Service. A well-crafted, compelling offer can set the stage for a successful sales process, effectively eliminating competition and positioning your agency as a guide. This chapter will delve into the consultative sales process, explore strategies for designing an irresistible offer, and illustrate the benefits of asking for money for the service as a proof of concept (POC).

According to a report by Statista, the global digital marketing software market size was valued at 43.8 billion U.S. dollars in 2019 and is expected to reach 100.37 billion U.S. dollars by 2027. This shows the huge potential for agencies if they can streamline their processes and offer a compelling, value-driven service to their clients. Source: Statista

The Consultative Sales Process

A consultative sales approach is a problem-solving process where your agency acts more like a consultant than a salesperson. The goal is to identify potential issues in the client's marketing strategy and then propose tailored solutions. This approach is mutually beneficial. You gain the clients' trust by demonstrating expertise and offering value, and the client receives personalized advice and a strategy tailored to their needs.

A fixed-scope service is a critical part of the consultative sales process. Here, your agency and the client agree on a specific outcome. This could be the development of a comprehensive marketing plan, a complete analysis of your client's current marketing strategy, or a roadmap to achieve desired marketing objectives. The key to a successful fixed-scope service is clear communication and alignment on expected outcomes.

The Marketing Strategy Development Service

The Marketing Strategy Development Service is a fixed-scope service designed to help clients take control of their marketing strategy. The service could be priced from \$500, \$1500, or \$5000+, depending on the client's size and complexity. The aim is not to make a considerable profit initially but to build trust and rapport with the client. The service acts as a POC, effectively eliminating competition and positioning your agency as the trusted guide.

Streamlining the Process

Historically, creating a marketing strategy has been a time-consuming, labor-intensive process fraught with risk. However, with the advent of process management software and AI, it can now be streamlined. By leveraging technology, you can reduce the time spent on strategy development tasks from weeks to hours. This allows you to focus on delivering value to the client and growing your agency.

Packaging and Pricing

The Marketing Strategy Development Service can be packaged as a light, standard, or expanded version based on the client's needs.

The standard process, a 10-hour service, includes an interview with two individuals from the client's team, a marketing assessment, an executive overview, a digital marketing analysis, a content marketing plan, and a marketing tech stack review.

For clients who require a more comprehensive service, the expanded 25-hour offer is ideal. It includes interviews with the marketing, sales, and executive teams, a team marketing assessment, an executive overview, a digital marketing analysis, a content marketing plan, a marketing tech stack review, a brand analysis, a social media plan, a lead generation strategy, an organic marketing plan, and a website analysis.

For startups or smaller organizations, the light 5-hour service includes an interview with one individual, a marketing assessment, an executive overview, and a digital marketing analysis.

Service	Light	Standard	Comprehensive
Interviews	Owner	+ Executive Team	+ Department Heads
Marketing Assessment	X	X	X
Executive Overview	X	X	X
Digital Marketing Analysis	X	X	X
Content Marketing Plan		X	X
Marketing Tech Stack Review		X	X
Brand Analysis			X
Social Media Plan			X
Lead Generation Strategy			X
Organic Marketing Plan			X
Website Analysis			X

Each package is priced accordingly and comes with a clear breakdown of what is included. This gives clients the ability to choose a package that best fits their needs and budget.

Creating an Irresistible Offer

The goal of the Marketing Strategy Development Service is not just to make a sale but to create a relationship with the client. This is achieved by making the offer irresistible. Here are a few strategies:

- **Time Limit:** Set a three-day deadline for the offer. This creates a sense of urgency and encourages the client to act quickly.
- **Volume Limit:** Create an artificial limit of engagements. This gives the impression of exclusivity, making the offer more appealing.
- **Conditional Discount:** Offer a discount on the condition that the client refers the Marketing Improvement Review to fellow executives. This not only incentivizes the client to accept the offer but also helps you reach a larger audience.
- **POC:** If the client decides to move forward, credit the cost of the Marketing Strategy Development Service towards the final contract. This reduces the financial risk for the client and increases the likelihood of them accepting the offer.

Creating an irresistible offer for a Marketing Strategy Development Service is a critical step in scaling your marketing agency. It allows you to build trust with potential clients, position your agency as a guide, and pave the way for a successful sales process. By following the strategies outlined in this chapter, you can craft an offer that is compelling, relevant, and impossible for clients to refuse.



"Clients often approach us with specific requests like SEO, new websites, or lead magnets, believing these are what they need. However, our role is to help them see beyond isolated services to the need for a unified, strategic foundation that integrates all aspects of marketing seamlessly. By shifting their focus from short-term fixes to a long-term, comprehensive strategy, we ensure that each element of their marketing aligns perfectly, facilitating smoother execution and more significant results."

On a Bumper Sticker:

Creating an irresistible offer for a Marketing Strategy Development Service is a key stepping stone in the journey of scaling a marketing agency. It's about building trust, eliminating competition, and setting the stage for a successful sales process.

Action Plan:

- Identify your client's marketing needs and challenges.
- Develop a Marketing Strategy Development Service that addresses these needs.
- Package the service into light, standard, and expanded versions.
- Price each package accordingly and clearly outline what is included.
- Create a compelling offer that is hard for clients to refuse.
- Leverage technology to streamline the process.
- Implement strategies such as time limits, volume limits, conditional discounts, and POCs to make the offer irresistible.

Now that we've explored the importance of creating an irresistible offer for a Marketing Strategy Development Service and how to go about it, let's move on to the next step in the process - conducting Engaging Client Interviews. This step is crucial in gathering crucial information to inform the marketing strategy. Stay tuned to learn more in the next chapter.

CHAPTER 5: STEP THREE: ENGAGING CLIENT INTERVIEWS



Good communication is as stimulating as black coffee, and just as hard to sleep after. - *Anne Morrow Lindbergh*

The journey to radical growth for a marketing agency begins with understanding the business landscape of the client. After winning the deal, the next step is to gather all qualitative information possible to learn their business, situation, pains, budget, capabilities, and capacities. This is needed for you to craft the plans.

This process is essentially like a doctor diagnosing a patient. The doctor needs to know the patient's symptoms, history, and current lifestyle before giving a prescription. Similarly, your marketing agency should know the client's business inside out before crafting a marketing strategy.

A well-structured intake form is an effective tool to gather this crucial information. It serves as a comprehensive questionnaire that the client fills out, allowing your agency to gain a deep understanding of the client's brand, business strategy, current marketing efforts, and objectives.

According to a study by the Content Marketing Institute, 61% of content professionals struggle to understand their audience's key needs. This data highlights the importance of the Engaging Client Interviews in understanding the client's business, their objectives, and their challenges. By implementing this step, marketing agencies can ensure they are creating tailored strategies that truly meet the client's needs. (Source: Content Marketing Institute, 2020)

The Company Intake Form is designed to capture the essence of the company. It includes fundamental and necessary questions like the full name of the company, the industry in which the company operates, the size of the company, the company's website, URL, etc.. It also includes details like the target market, unique selling proposition, business goals, and key products or services are also collected. This form also asks about the main competitors and what differentiates the company from its competitors.

The information gathered from the Company Intake Form helps to create a tailored digital marketing strategy that aligns with the company's goals, target market, and unique value proposition. Understanding the competitive landscape is also crucial as it allows the agency to craft a strategy that sets the client apart from its competitors.

The Marketing Intake Form, on the other hand, focuses on the company's current marketing efforts, objectives, and challenges. This form includes questions about the marketing channels the company is currently using, their annual marketing budget, the structure of their marketing team, and their primary marketing objectives for the upcoming year. It also investigates the metrics they use to measure the success of their marketing efforts and their biggest marketing achievements and challenges in the past year.

The Marketing Intake Form also looks into future marketing plans, including any specific marketing initiatives or campaigns the company wishes to implement. If known, the current customer acquisition cost and the estimated lifetime value of customers are also asked. Information about the company's current marketing tools and technology platforms is also collected, along with their evaluation of their current website and overall digital presence.

The information collected through the Marketing Intake Form allows your marketing agency to understand the client's current marketing situation, including their strengths, weaknesses, and areas for improvement. It also provides insight into the client's marketing objectives and how they measure success, helping your agency align its strategy with the client's goals.

Engaging Client Interviews are a vital step in the marketing strategy led process. They ensure that your team has a deep understanding of the client's business and marketing situation before crafting a strategy. This understanding is crucial to creating a strategy that not only meets the client's objectives but also aligns with their brand, target market, and unique value proposition.

The knowledge gained from Engaging Client Interviews also assist your agency craft a comprehensive, tailored marketing strategy that addresses the client's unique needs and objectives. This strategy is more than just a response to a tactical problem; it's a plan that you and the client can execute in a predictable way, leading to sustainable growth for both the client and your agency.

In short, Engaging Client Interviews are a vital step in the journey to radical growth for your marketing agency. They ensure you have a deep understanding of the client's business and marketing situation, allowing it to craft a strategy that delivers results. By implementing this step, your agency can move from merely reacting to clients' wants to proactively addressing their needs, leading to sustainable growth and success.



"I highly value the use of open-ended questions in intake forms for their ability to give control back to the client. This approach enables clients to describe their situation, pains, and aspirations in their own words, fostering a deeper connection. It's more than data collection; it's about making clients feel heard, understood, and valued. Interestingly, as clients articulate their thoughts, they often gain insights into their business they hadn't realized before."

On a Bumper Sticker:

Engaging Client Interviews are the key to unlocking your client's needs. They ensure a deep understanding of the client's business, paving the way for a tailored strategy that leads to sustainable growth.

Action Plan:

- Create comprehensive Company and Marketing Intake Forms.
- Ensure all clients fill out the intake forms in detail.
- Review the forms to understand the client's business and marketing situation.
- Use the information to craft a tailored marketing strategy.
- Implement the strategy and measure its success.
- Regularly update the intake forms to reflect changes in the client's business or marketing situation.

Having a deep understanding of the client's business is the starting point, but it's not enough. In the next chapter, we will delve into the process of conducting a thorough marketing assessment, another crucial step in the Strategy Led Sales Process.

CHAPTER 6: STEP FOUR: MARKETING ASSESSMENT



Measurement is the first step that leads to control and eventually to improvement. If you can't measure something, you can't understand it. If you can't understand it, you can't control it. If you can't control it, you can't improve it.

- H. James Harrington

Embarking on the journey of building a Strategy Led Sales Process for your agency, you've now arrived at a crucial milestone - the marketing assessment. This step is akin to the moment of truth in your quest to scale your agency. It's where you transform the abstract concepts of strategy into a quantifiable measurement, creating a roadmap that will guide your clients to their desired business outcomes.

The marketing assessment is an essential tool that enables you to evaluate your client's marketing capabilities. It serves as a Fit-Gap analysis, providing a clear picture of where your clients currently stand and what they need to achieve their business goals. By translating marketing building blocks into business terms, you and your clients can understand the results with clarity and precision.

Think of this process as a comprehensive health check of your client's marketing capabilities. It's like a medical check-up, where a doctor examines a patient, identifies the health concerns, and then prescribes a treatment plan. Likewise, you will examine your client's marketing health, identify gaps, and prescribe a strategy to improve their business condition.

The marketing assessment consists of capability questions that can be answered with a simple 'yes' or 'no'. These questions are designed to offer an in-depth assessment of your client's marketing capabilities across various dimensions. It's an objective way to identify the strengths, weaknesses, and opportunities for improvement in your client's marketing strategy.

According to a study by the Harvard Business Review, companies that effectively coordinate their analytics capabilities with their marketing strategy enjoy 1.5 to 1.9 times more growth than companies that do not. They also achieve 1.4 to 1.7 times more profit margins and 1.3 to 1.6 times more return on assets. This data underlines the importance of conducting a comprehensive marketing assessment to align your marketing capabilities with your strategic goals. (Source: Harvard Business Review)

Each question in the assessment is associated with a score. These scores are then linked to a list of projects that can be executed to build on the identified capabilities. It's a dynamic tool that not only identifies the gaps but also offers a roadmap to fill those gaps.

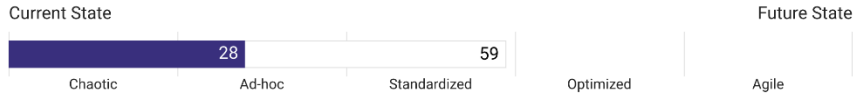
The marketing assessment breaks everything down into four key categories. This categorization allows you to pinpoint whether the capacity or the capability is the problem. It's a holistic approach that provides a comprehensive view of your client's marketing health, paving the way for strategic planning.

- **Digital Marketing Management:** The strategic planning and execution of marketing campaigns across digital platforms, focusing on goals, budgets, and performance analysis.
- **Digital Content Creation:** The process of developing and producing engaging material such as videos, blogs, and graphics tailored for online audiences.
- **Digital Traffic Generation:** The techniques and strategies used to attract more visitors to a website or digital platform, including SEO, social media marketing, and paid advertising.
- **Digital Marketing Systems:** The tools and technologies that support the execution and measurement of digital marketing activities, including CRM systems, analytics tools, and marketing automation platforms.

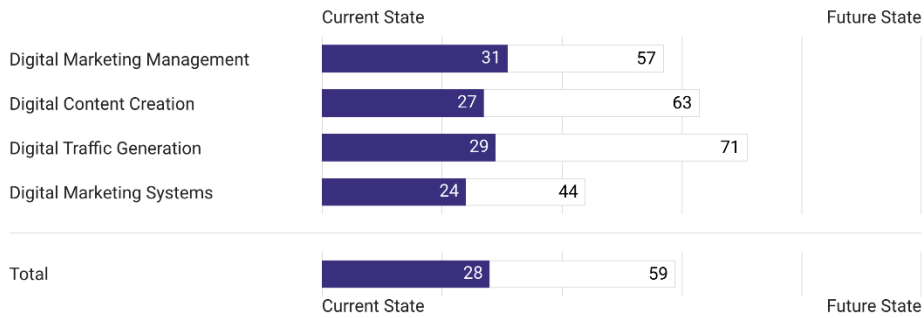
Digital Marketing Needs Assessment for Process

🕒 2024. Mar. 12.

The Digital Marketing Maturity Score shows how the competitiveness of your company is promoted by digital technologies. It is capable of measuring how the seven key components function in your company, which influence and determine how much competitive advantage your company can gain through Digital Transformation. It highlights the areas where inadequate operations generate a disadvantage for your company in comparison to your competition. The results are illustrated by an index ranging between 0 and 100, which translates as follows:



Digital Marketing Maturity Score Category Results



Which statements are true about your Written Content?



Statement	Current State	Future State	Recommendations
Our email marketing content is relevant and the open rates are high	<input checked="" type="checkbox"/>		
Our thought leadership content is distributed by industry leaders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Guest Post Creation +
Our text message/SMS marketing is converting well	<input checked="" type="checkbox"/>		
Our written articles and blogs are driving significant traffic and SEO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Blog Creation +
Our customer case studies convince prospects to work with us	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Case Study Creation +
Our prospects can learn about our products and services through educational materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Self-Service Content Creation +
Our website content is relevant and converts prospects to clients	<input checked="" type="checkbox"/>		
Our landing pages are highly converting	<input checked="" type="checkbox"/>		
Our digital marketing campaigns drive traffic and conversions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Campaign Content Creation +

Note
Comment

Tasks

Add New Todo Item +

The marketing assessment is not just a scorecard; it's a mirror reflecting your client's marketing health. It's an honest evaluation that lays bare the realities of your client's marketing capabilities, revealing both the strengths to be leveraged and the weaknesses to be addressed. The assessment is a transformational tool that turns the subjective into the objective, the abstract into the concrete, and the complex into the simple. It demystifies the strategy, making it accessible and understandable for your clients. It's a tool that empowers your clients, giving them a sense of ownership and control over their marketing strategy.

In essence, the marketing assessment is a strategic tool that lays the foundation for the next steps in your Strategy Led Sales Process. It's the cornerstone upon which you build your client's marketing strategy, setting the stage for the planning and implementation phases.

By conducting a thorough marketing assessment, you not only gain a deep understanding of your client's marketing capabilities, but you also establish yourself as a strategic partner. You demonstrate your commitment to your client's success, reinforcing their trust and confidence in your agency.

Remember, the journey of scaling your agency is not about quick wins or short-term gains. It's about building sustainable and profitable relationships that stand the test of time. The marketing assessment is a critical step in this journey, a step that propels you closer to your ultimate goal - to radically grow your marketing agency.



"The truthfulness of numbers is particularly evident during a marketing assessment, providing a moment of clarity for clients as they see their scores—maybe a 20 or 40—against an ideal 80 or 100. This numeric evaluation does more than highlight deficiencies; it delves into the reasons behind them and lays out a concrete strategy for improvement. By converting the nebulous idea of "improvement" into specific goals and actions, clients can clearly understand their current position and feel motivated to undertake the required transformations."

On a Bumper Sticker:

A thorough marketing assessment is not just a scorecard. It's a strategic tool that turns abstract concepts into concrete measurements, giving you the clarity to lead your clients towards their desired business outcomes. It's the cornerstone upon which you build your client's marketing strategy.

Action Plan:

- Start with a comprehensive list of capability questions for your marketing assessment.
- Translate marketing building blocks into business terms for better understanding.
- Categorize your assessment into People, Process, and Technology.
- Use the assessment scores to identify and prioritize projects.
- Keep track of the assessment scores for future reference and improvement.

The marketing assessment is just the beginning. It paves the way for the next step of your journey - marketing planning. Stay tuned to explore how you can leverage your assessment insights to craft a comprehensive marketing plan.

CHAPTER 7: STEP FIVE: MARKETING PLANNING



Marketing is telling the world you're a rock star. Content Marketing is showing the world you are one. – ***Robert Rose, Chief Strategy Advisor, Content Marketing Institute.***

The road to success in any marketing agency lies in its ability to plan effectively. It's about knowing where you're going, how you're going to get there, and what you'll do when you arrive. Think of it as a roadmap for your agency - a clear, detailed, and comprehensive blueprint that guides everything you do. This chapter delves into the fifth step of our proven formula: marketing planning.

Marketing planning is an essential part of building a Strategy Led Sales Process. It's about setting clear goals and objectives, and preparing for the execution phase of the strategy. By the end of this chapter, you will have a better understanding of how to develop a robust marketing plan, how to use AI to automate parts of the process, and how to connect your clients' objectives to a resolution plan under your control.

According to a recent survey by HubSpot, 64% of marketers actively invest time in search engine optimization (SEO). Yet, a staggering 61% of these marketers believe generating traffic and leads to be their biggest challenge (HubSpot, 2020). This gap between effort and result underscores the importance of having a robust marketing plan. It's not just about doing the work; it's about doing the right work.

The first step in marketing planning is going through the intake, assessments, and adding your notes. This is where you gather all the necessary information about your client's needs, their current marketing efforts, and their future goals. It's about understanding where they are now, and where they want to be in the future. By conducting thorough intake and assessments, you will have a clear picture of your client's marketing landscape, which will serve as the foundation for your marketing plan.

The next step is where AI comes into play. Based on the information gathered during the intake and assessments, AI generates recommendations for a roadmap that will achieve the desired outcomes within the limits of your client's capabilities and capacity. This not only saves you time but also ensures that the recommendations are data-driven and tailored to your client's specific needs.

Once the roadmap is generated, the AI tool goes a step further and creates project scopes based on your input. This ensures that each project is automated but under your control, giving you the freedom to tweak, adjust, and personalize according to your client's needs and your agency's capabilities.

The final step in the process is generating detailed project plans. Again, this is done by the AI tool based on your inputs. It outlines what deliverables are expected, who is responsible for each task, and what the timeline for completion looks like. This level of detail allows you to manage expectations effectively, and ensures that everyone involved in the project knows what their role is and what they need to do.

Marketing planning is not just about setting goals and objectives, it's also about establishing a sustainable model for executing and monitoring the process tied to a Marketing Capability improvement. By using the marketing strategy as a menu for your services, you can build a sustainable model that improves the assessment scores with accountability.

This approach enables you to execute projects as a recurring service revenue, improving the marketing capabilities of your client while generating consistent income for your agency. More importantly, it allows you to control the value of the service, setting expectations properly, and ensuring that your agency is accountable only for the Marketing Capability improvements.



Market Analysis

You can leverage the AI to build the content and then edit it or just build content from scratch.

Market Analysis Generate Market Analysis

Industry Trends:

1. Shift towards digitalization: The Information Services industry is experiencing a significant shift towards digitalization, with companies focusing on providing innovative digital solutions to their customers.
2. Increasing demand for privacy and security: With the growing concerns around data privacy and security, consumers are prioritizing products and services that offer strong security measures.
3. Integration of AI and AR technologies: Emerging technologies like artificial intelligence (AI) and augmented reality (AR) are being increasingly integrated into products and services, offering new and immersive experiences to consumers.

Competitor Analysis:

1. Samsung: Samsung is a key competitor for Apple, offering a wide range of electronic devices and services. They focus on innovation and cutting-edge technology.
2. Google: Google is known for its software and services, including Google Search, Android operating system, and Google Cloud. They also compete with Apple in the smartphone market.
3. Microsoft: Microsoft offers a variety of software, hardware, and cloud services, competing with Apple in the productivity and operating system markets.

OK Cancel

It's not a mystery marketing planning is a critical step in building a Strategy Led Sales Process. It's about setting clear goals and objectives, creating a roadmap to achieve those goals, and preparing for the execution phase of the strategy. By leveraging the power of AI, you can automate parts of the process, save time, and deliver data-driven recommendations tailored to your client's needs. More importantly, it empowers your agency to control the value of the service, manage expectations effectively, and establish a sustainable model for growth.

So, take the time to plan effectively. It's the roadmap to your agency's success. And remember, the journey to growth is not a sprint, it's a marathon. But with the right plan in place, you'll be well-equipped to navigate the twists and turns, overcome the obstacles, and reach the finish line. And when you do, the view from the top will be worth it.



"Numbers reveal truths, especially in marketing assessments, offering clients clarity on their performance—be it a score of 20 or 40 versus an ideal of 80 or 100. This quantification does more than uncover deficits; it explains their causes and outlines a precise improvement plan. Turning the vague notion of "improvement" into actionable steps, clients see their reality and feel motivated to embrace necessary changes. This clarity transforms assessments into powerful growth tools."

On a Bumper Sticker:

Marketing planning isn't a luxury; it's a necessity. A roadmap to success, it guides you from where you are to where you want to be. It's not just about setting goals; it's about achieving them.

Action Plan:

- Conduct a thorough intake and assessment process to understand your client's needs and current marketing efforts.
- Use AI to generate a roadmap tailored to your client's specific needs and capabilities.
- Leverage AI to automate the creation of project scopes and plans.
- Use a marketing strategy as a menu for your services.
- Aim to improve assessment scores with accountability.
- Execute projects as a recurring service to generate consistent revenue.

Now that we have a robust marketing plan in place, it's time to present it to the client. How do we effectively do that? Let's find out in the next chapter.

CHAPTER 8: STEP SIX: THE PRESENTATION



Good design is good business. - *Thomas Watson Jr., IBM*

With every progression in your journey, one fundamental truth remains steadfast: Every marketing strategy should tell a compelling story. This chapter delves into the art of presentation - the moment when your strategic brilliance is unveiled, and the potential of your client's future success is laid bare.

At this stage in your process, you've done an exceptional job of understanding your client's needs, crafting an irresistible offer, gathering key insights, assessing their marketing capabilities, and planning out an effective marketing strategy. Now it's time to present this marketing strategy to your client.

The presentation is more than just revealing your work; it's about narrating a story of transformation. It's about taking your client on a journey from where they are now to where they could be with your assistance. This journey is illustrated in the Marketing Strategy Document, a comprehensive roadmap designed to guide the digital marketing efforts of a company.

According to a report from Demand Metric, 70% of marketers are actively investing in content marketing. The same report reveals that 60% of marketers regard content marketing as 'very important' or 'extremely important' to their overall strategy. These numbers underscore the need for a strategic approach to marketing, one that ties in with the overall business objectives of a company. (source: Demand Metric, 2020)

- The Executive Components of the document serve as an introduction, setting the stage for the strategic analysis to come. It provides an overview of the company, its mission, vision, values, key offerings, and target demographic. It's like the opening chapter of a book, setting the scene and introducing the characters.
- The Strategic Analysis is where you delve into the core of your client's business. You analyze the market, identify opportunities and challenges, and assess the company's strengths, weaknesses, opportunities, and threats. This is the plot of your story, the challenge your characters face.
- The Marketing Foundation defines the goals and objectives for the digital marketing strategy. It helps you create detailed profiles of the target market segments to inform targeted marketing efforts. It's akin to character development in your story, painting a vivid picture of who your characters are and what they aspire to.
- The Strategic Framework ties the digital marketing efforts to the company's broader business strategy and objectives. It's the climax of your story, where all the threads come together and the vision for the future is articulated.
- Tactical Planning is where you outline the specific actions that will be taken to achieve the marketing objectives. This includes developing a content marketing strategy, a social media strategy, SEO and SEM strategies, and an email marketing strategy. It's the action-packed sequence in your story where your characters start to overcome their challenges.
- The Channels and Technologies section provides an analysis and optimization recommendations for various digital channels. It also provides a review and recommendations for marketing technologies to enhance efficiency and effectiveness of marketing efforts. It's like the tools and weapons your characters use to conquer their obstacles.
- The Execution and Management section is like the expedition plan for your characters. It details the implementation roadmap, the budget, and resource allocation for the marketing strategy.

Digital Marketing Strategy Development

Project Scope

Why it is beneficial to have a Digital Marketing Strategy:

Digital marketing strategies are an essential part of any business looking to succeed in today's digital world. With a combination of organic search engine marketing, paid ads, social media management, and content marketing, these strategies are built with the goal of achieving revenue goals, promoting customer retention, and building brand awareness and loyalty.



The main benefits of creating a digital marketing strategy are:

1. Access to new markets
2. Leverage disruptive opportunities
3. Reach a very large audience
4. Direct connection with clients and partners
5. Drive traffic to your website
6. Increase sales and profitability
7. Measure and evaluate messaging and communication performance
8. More attractive to top talent

Project Plan

How Digital Marketing Strategy Development works:

The process of creating a marketing strategy includes the following steps:

The audit step includes the following activities:

1. Reviewing the current situation
2. Compiling marketing data
3. Conducting interviews
4. Preparing a report

The recommendations step includes the following activities:

1. Developing a marketing plan
2. Preparing a budget

The planning step includes the following activities:

1. Implementing the marketing strategy
2. Monitoring and adjusting the strategy

- The Performance Measurement section defines the key performance indicators and metrics for tracking the success of the digital marketing strategy. It's like the compass that guides your characters, ensuring they're on the right path.

The final sections, Risk Management and Continuous Improvement, are all about planning for the future. They highlight the potential risks to the marketing strategy and provide strategies for their mitigation. They also detail methods for continuous optimization of the marketing strategy based on performance data and future planning. They're like the epilogue of your story, setting the stage for future adventures.

In essence, the Marketing Strategy Document is your client's story, penned with your expert guidance. It's a story of transformation, of overcoming challenges and achieving growth. And the presentation is your opportunity to narrate this story to your client, to take them on this journey and inspire them to envision a future where their business isn't just surviving but thriving.

As you present this story, remember that the key to a successful presentation is not just about what you say, but how you say it. Speak with confidence, clarity, and conviction. Remember to pause, engage, and invite questions. And most importantly, remember to listen. Because every question, every comment, every feedback is an opportunity for you to refine your story, to make it resonate even more with your client.

At the conclusion of your presentation, leave your client with a sense of excitement and anticipation for the future. Inspire them with the potential of what could be achieved with your strategic guidance. And reassure them that with your expertise, they're not just investing in a marketing strategy, they're investing in a brighter, more prosperous future for their business.

In the chapters to come, we will explore how to retain, expand, and reduce churn, jumpstart your process in as little as 7 days, and learn 5 ways to boost your process. But for now, cherish the accomplishment of ***presenting your marketing strategy - a strategic roadmap to radical growth.***



"I cherish the moment our presentation begins, unveiling a detailed 40-50 page strategy document. It's thrilling to offer a deep dive into any part of the plan, particularly when facing skeptics within the client's team who try, and fail, to find flaws. These moments underscore the depth and robustness of our strategy, demonstrating the meticulous, data-driven thought behind each recommendation. This is not just a presentation but a showcase of our expertise, tailored to the client's needs, where any doubts about our role quickly fade."

On a Bumper Sticker:

The presentation of the marketing strategy is not just a reveal, it's a transformational journey. It's about taking your client from their current state to a future where their business isn't just surviving but thriving.

Action Plan:

- Review your client's business details.
- Develop an in-depth market analysis.
- Define clear marketing objectives.
- Develop detailed target audience profiles.
- Align the digital marketing efforts with the company's broader business strategy.
- Outline the specific actions to be taken to achieve the marketing objectives.
- Define key performance indicators and metrics for tracking the success of the digital marketing strategy.

As we conclude this chapter, you may be wondering, What now? Well, the journey doesn't end here. Your presentation may have been a success, but your work is far from over. In the next chapter, we delve into the final step of our process: Retention, Expansion, and the No Churn Model. Stay tuned!

CHAPTER 9: STEP SEVEN: RETENTION, EXPANSION, AND NO CHURN MODEL



Always deliver more than expected.
- *Larry Page, Co-founder of Google*

In the world of marketing, customer retention is not just a strategy; it's survival. It's no secret that keeping your existing client is less expensive than acquiring a new one. While expansion and growth are important, they become meaningless without a solid retention strategy. In this chapter, we will explore the final step of our marketing strategy led process - retention, expansion, and the no churn model. This is the step that ensures endurance, sustainability, and long-term success for your marketing agency.

Retention is all about maintaining and nurturing existing relationships with clients. The goal is to keep them satisfied and engaged so much that they continue to use your services and become advocates for your agency. However, retention is not just about keeping clients; it's about growing with them. By understanding their needs and aligning your services to meet those needs, you can create opportunities for expansion.

According to a study by Harvard Business School, increasing customer retention rates by just 5% can increase profits by anywhere from 25% to 95%. Furthermore, Bain & Company found that a 5% increase in customer retention can increase a company's profitability by 75%. These numbers clearly underscore the importance of client retention and its direct impact on an agency's revenue and profitability. (Sources: Harvard Business School, Bain & Company)

Expansion here refers not only to bringing in new clients but also to expanding the scope of services offered to existing clients. When your clients see the value you bring to their business through your marketing strategy, they will be more willing to entrust you with more projects and responsibilities. This is a win-win situation where you get to increase your revenues without drastically increasing your client base or resources.

The 'No Churn' model is a concept that focuses on mitigating client loss or churn. Churn is a reality all agencies face, and it can be detrimental to your growth and stability. The key to a successful no churn model is demonstrating your value consistently and ensuring that your clients cannot execute their marketing strategy without you. If there is a failure, having a transparent process and clear communication can help your client understand that you are not to blame.

Let's delve into how you can incorporate these five elements into your marketing strategy led process and create a sustainable model for your agency's growth.

1. Review your assessment and strategy quarterly. This allows you to measure progress, identify areas of improvement, and address any concerns or issues promptly. By reviewing your strategy, you can adjust your services and solutions to meet your client's changing needs and market trends. This helps in reinforcing your value to your client and ensuring they see the progress and impact of your work.
2. Generate clear accountability and visibility of your plans will significantly enhance your client's trust and confidence in your agency. Your plans should clearly articulate what you aim to achieve, how you intend to do it, and who is responsible for each task. This provides a clear statement of work and leaves no room for ambiguity or misunderstandings.

3. Create scorecards reflecting progress and value you are delivering to your clients. By maintaining and regularly updating scorecards, you can demonstrate your effectiveness and justify your strategies and tactics. This not only validates your work but also gives your clients a sense of comfort and confidence in your services.
4. Focus value and results on continued expansion. When your clients see the impact of your work, they will be more inclined to give you more work and responsibilities. This helps in increasing your revenues without necessarily increasing your resources or workload.
5. Mitigate churn: This is all about highlighting your value and being indispensable to your clients. If there is a failure or a setback, having a clear process and strategy can help you demonstrate that you are not to blame. By being proactive and transparent, you can manage your clients' expectations and ensure that they understand the value you bring to their business.

Implementing these five strategies can help you transform your marketing agency from a reactive service provider to a proactive partner in your clients' success. It enables you to shift from a tactical mindset to a strategic one, helping your clients achieve their marketing goals while growing your agency.

However, remember that this is a journey, not a destination. The process of refining your marketing strategy and aligning it with your client's needs is ongoing. It requires patience, perseverance, and commitment. But the rewards are worth it - a thriving agency, satisfied clients, and a sustainable model for growth.

Remember the essence of this journey. It's not just about implementing a process or achieving short-term goals. It's about transforming your agency, empowering your clients, and creating a legacy that lasts. It's about writing your story, your way. And as you embark on this journey, remember, you are not alone. You have the tools, the knowledge, and the passion to make it happen. So, let's get started. Let's grow together.



"The Monthly Recurring Revenue (MRR) model excels in keeping churn near zero while opening paths for expansion. Observing agencies, I've noticed they can boost revenues by at least 20% annually without new clients, simply by enhancing existing client relationships. This not only ensures stable income but also promotes mutual growth. What's game-changing about MRR is its ability to free agency owners from daily tasks, enabling them to concentrate on overarching strategies for sustainability. It redefines success from ceaseless client pursuit to enriching current partnerships, emphasizing the profound benefits of collaborative growth."

On a Bumper Sticker:

Retention, expansion, and a no churn model are the pillars of a thriving marketing agency. Ensuring client satisfaction, expanding services, and mitigating client loss will pave the way for sustainable growth.

Action Plan:

- Review your assessment and strategy quarterly to adjust your services according to your client's needs.
- Maintain clear accountability and visibility of your plans.
- Regularly update your scorecards to demonstrate your effectiveness.
- Always demonstrate your value to your clients to encourage them to entrust you with more work.
- Have a clear process and strategy to mitigate churn and manage your clients' expectations.

While retention, expansion, and a no churn model are crucial, have you ever wondered if there's a way to jumpstart the entire process and see results faster? Stay tuned for the next chapter as we delve into an exciting concept - the 7 Day Jumpstart.

CHAPTER 10: 7 DAY JUMPSTART



Success usually comes to those who are too busy to be looking for it. - *Henry David Thoreau*

In this exciting chapter, we delve into the heart of the 7 Day Jumpstart, a comprehensive guide designed to help you implement the The 7 Step Strategy Led Sales Process in just one week. For those who feel overwhelmed by the daunting task of creating a marketing strategy, the 7 Day Jumpstart offers an efficient solution.

This process is designed for any marketing agency, regardless of size or maturity. Whether you're a young, ambitious startup strategist or a seasoned growth guru, the 7 Day Jumpstart can facilitate your path to sustainable growth.

The beauty of the 7 Day Jumpstart lies in its simplicity. Each day is dedicated to a specific step in the process, allowing you to focus exclusively on that task. The steps are as follows:

- ❖ **Day 1: Marketing Improvement Review**
- ❖ **Day 2: Crafting an Irresistible Offer for a Marketing Strategy**
- ❖ **Day 3: Engaging Client Interviews**
- ❖ **Day 4: Marketing Assessment**
- ❖ **Day 5: Marketing Planning**
- ❖ **Day 6: Presentation of the Back-End Products**
- ❖ **Day 7: Retention, Expansion, and the No Churn Model**

For each day, there is a video to review, a short training session, and an experiment to run using the software. You can do these activities with your own agency or with a client. These exercises are not merely theoretical; they are practical implementations designed to give you a hands-on experience of the process.

To foster a communal learning environment, we have weekly jumpstart group coaching sessions. These sessions offer an excellent opportunity to review your progress, clarify doubts, share experiences, and ask questions. The community engagement adds another layer of learning, providing you with a platform to interact with peers who are on the same journey.

While we call it the 7 Day Jumpstart, the pace is entirely up to you. We believe that dedicating one hour each day can help you complete all the tasks and adopt the system. However, how you choose to pace yourself is entirely up to you. Some of our clients have implemented the process immediately through a sales process, while others have binged the entire program in one sitting. Some even let their entire team implement it over a few weeks. The key is to choose a pace that works for you and your agency.

The role of AI in this process is to streamline your efforts. It helps automate the marketing strategy creation, allowing you to focus on other important aspects of your business. As you leverage AI, you'll find that you're able to achieve results faster, freeing up time and resources.

According to the RSW/US 2021 Agency New Business Report, 70% of agencies report the biggest obstacle to their growth is a lack of time and resources to focus on new business. In the same report, 80% of agencies stated that their new business program was not effective. This highlights the importance of having a well-defined, efficient, and predictable process, like the 7 Step Marketing Strategy Led Process. By dedicating just 1 hour each day to implementing this process, agencies can transform their sales approach and, ultimately, their growth trajectory. (source: RSW/US 2021 Agency New Business Report)

The 7 Day Jumpstart is more than just a guide; it's a paradigm shift. It's a step away from the reactive sales process that plagues many marketing agencies. By focusing on a proactive approach that addresses the client's strategic needs, you move from offering tactical services to delivering a comprehensive marketing strategy.

This process also redefines the role of the marketing agency. By defining the future state of marketing capabilities, your agency can develop these capabilities and control them, rather than being responsible for outcomes over which you have no control. This shift is empowering and liberating, opening up avenues for growth that were previously out of reach.

By the end of this chapter, you should be equipped with the knowledge and tools to implement the 7 Day Jumpstart. It's a journey that requires commitment and effort, but the rewards are worth it. Imagine a future where your agency is not just surviving but thriving. That's the promise of the 7 Day Jumpstart.

As you embark on this journey, remember that you're not alone. The community is here to support you, and the lessons you learn will help you grow. So let's jumpstart your journey to growth. It's time to take control of your agency's future and redefine what's possible. Good luck!



"Leading agencies through the 7 Day Jumpstart and our advanced Marketing programs reveals the unique ways teams adapt and thrive. The pace varies—some complete it over a weekend, others over weeks—but the progress is universal, spanning small and large organizations. The standout moment is when entrepreneurs tailor the program, blending their creativity with our structure to achieve remarkable outcomes. Regularly, participants share breakthroughs, even in early stages, underscoring the effectiveness of personalization. These success stories are not just victories for the agencies but also inspire the entire community. It reaffirms that, regardless of size or challenges, significant progress is possible with commitment and a tailored approach to our strategies."

On a Bumper Sticker:

The 7 Day Jumpstart is a practical guide to transforming your agency's sales process and growth trajectory. It's not about perfection, but progress. Remember, every challenge is an opportunity for growth.

Action Plan:

- Review your current sales process - is it reactive or proactive?
- Set aside 1 hour each day to start implementing the The 7 Step Strategy Led Sales Process.
- Involve your team in the process - make it a collective effort.
- Don't just watch the videos and read the guides - take action.
- Attend the weekly coaching sessions - don't be afraid to ask questions.
- Leverage the power of AI to streamline your process.
- Engage with the community - share your experiences and learn from others.

As you embark on your 7 Day Jumpstart, you may be wondering, What's next? In the next chapter, we'll delve into additional strategies to boost your agency's growth. So, get ready to step up your marketing game!

CHAPTER 11: BONUS: 5 WAYS TO BOOST



The best way to predict the future is to create it.

- *Peter Drucker*

The journey towards agency growth is not a straight line. It's a winding path with its fair share of challenges, obstacles, and detours. But, it's also filled with opportunities for innovation, learning, and expansion. As we navigate this path, it's crucial to keep our eyes open for new avenues that can propel us towards our goal. In this chapter, we delve into five additional strategies that can turbocharge your growth and provide a competitive edge.

Firstly, let's talk about **Standard Packages**. A successful agency is like a well-stocked supermarket, offering a wide array of products and services to cater to different customer needs. But, unlike a supermarket, where customers can walk in, pick up a product, and pay at the counter, agencies often operate on a bespoke model, customizing their offerings based on individual client requirements.

While this approach has its merits, it can often lead to inefficiencies and inconsistencies.

The solution?

Standard Packages: Just like an off-the-shelf product in a supermarket, a standard package is a well-defined, pre-packaged service that you can offer to your clients. Not only does this streamline your operations, but it also makes it easier for clients to understand, compare and choose your services. You can create packages across different budget ranges, target audiences, and business objectives, giving your clients the flexibility to choose the one that fits them best. What's more, standard packages can also be a great way to showcase your expertise and value proposition, helping you stand out in a crowded marketplace.

Partnerships: In the world of business, it's not just what you know, but who you know that counts. Building strategic partnerships can provide a powerful boost to your agency's growth. This goes beyond just referrals to your services. Instead, explore partnerships that can refer to your assessment, allowing you to build your benchmark. This approach not only gives you access to a wider client base but also positions you as a trusted expert in your field, enhancing your reputation and credibility.

Benchmarking: Building your own benchmark enables you to show prospects how your clients' marketing scores stack up against theirs. This is a powerful tool that not only demonstrates your expertise but also provides tangible evidence of the value you bring. A well-constructed benchmark can be an eye-opener for prospective clients, nudging them to re-evaluate their current strategies and consider your services.

Certification: Certifications are not just about adding another feather to your cap. They are a testament to your commitment, expertise, and credibility. By getting certified, you can offer your clients the confidence that you follow a legitimate process for marketing strategy, and that you are trained and certified to do so. In addition, certifications can also be a great way to ensure your team is educated and stays updated on the latest trends and best practices in the industry.

Community: Building and nurturing a community can be a game-changer for your agency. A strong community not only provides a platform for networking and learning, but also fosters a sense of belonging and collaboration. You can leverage your community to gain insights, share knowledge, and even crowdsource solutions to common challenges. More importantly, a community serves as a support system, a place where you can reach out for help when you need it.

According to a report by the Drum, 64% of agencies have difficulty proving ROI to their clients. This inability to demonstrate value often leads to shorter client engagements, lower contract values, and inconsistent cash flow. Furthermore, a survey by HubSpot found that 60% of agencies struggle with lead generation and new business development. These statistics underscore the importance of implementing a marketing strategy led sales process, which can not only enhance the agency's value proposition but also create a predictable revenue stream. (Source: The Drum, HubSpot)

As we wrap up this chapter, we'd like to leave you with a thought. Growth isn't just about numbers - it's about evolution, transformation, and progress. It's about moving forward, one step at a time, towards your vision of success. And while the journey may be challenging, remember that every step you take is a step towards growth.

So, as you embark on your journey towards agency growth, don't forget to explore these five strategies. They could be the missing pieces in your growth puzzle, helping you unlock new opportunities and achieve your goals. Stay persistent, stay passionate, and most importantly, stay true to your vision. After all, the journey is as important as the destination.

Remember, the world of marketing is ever-changing, but the heart of an agency remains the same. So, reignite your passion, redefine your potential, and let's revolutionize the industry. Together, we can grow.

In the end, your success is our success.

Thank you for joining us on this journey. Let's keep the conversation going, and together, let's write the next chapter in your agency's growth story.

Remember, it's not just about surviving, it's about thriving. Let's make it happen. Together.

To your success!



"Building a community of entrepreneurs has been rewarding, bringing together creative minds to share insights and shape the future of marketing. This network serves as an innovation hub, where collective expertise addresses challenges and sparks new opportunities. Witnessing this community in action underscores the power of collective effort in redefining marketing. It's clear that shaping the future of this field is a shared journey."

On a Bumper Sticker:

In a world where competition is fierce and clients' expectations are high, the key to sustainable agency growth lies in a Strategy Led Sales Process. By streamlining your operations, enhancing your value proposition, and building strategic partnerships, you can unlock unprecedented growth and take your agency to new heights

Action Plan:

1. Review your current service offerings and identify opportunities to create **standard packages**.
2. Identify potential partners who can refer to your assessment and help you build your benchmark.
3. Invest in a certification program to enhance your credibility and expertise.
4. Start building your community and leverage it for networking, learning, and support.
5. Implement the strategies discussed in this chapter and monitor their impact on your agency's growth.

As we wrap up this chapter, remember, the journey to growth is not a destination, it's a process. Each step you take brings you closer to your vision of success. But what's next? What are the steps you need to take to implement everything you've learned? Stay tuned for the final chapter, where we'll guide you through the next steps in your agency's growth story.

CHAPTER 12: NEXT STEPS

As we approach the end of this enlightening journey, it's essential to reflect on the knowledge we've acquired. The aim of this book has been to provide marketing agencies a roadmap to sustainable growth using a Strategy Led Sales Process. With the insights you have gained, you are now equipped to transform your agency from merely surviving to thriving. However, knowledge alone is not enough. It's the implementation of this knowledge that will lead you to success.

This chapter is dedicated to outlining the next steps in your journey to revolutionize your marketing agency. Whether you're a small agency looking to scale or a midsize agency aiming to increase efficiency, this guide will direct you towards a path of continuous growth.

Step 1: Understand Your Current Position

The first step is to introspect. Understand your current position, your strengths, and the areas where you can improve. Reflect on your sales process and identify if it reacts to client wants or if it's designed to address their strategic needs. If it's the former, it's time for a transformation.

Step 2: Embrace the Strategy Led Sales Process

The heart of this transformation lies in embracing a Strategy Led Sales Process. This process involves creating a client Marketing Strategy that guides your agency's operations. This strategy will not just be a solution to a tactical problem but a comprehensive plan that your agency can execute to deliver value to your clients.

Step 3: Streamline your Process with SOP and Software

Next, streamline your process. The creation of a marketing strategy need not be a complex and time-consuming process. Standard Operating Procedures (SOP) and software can help simplify the process and make it more efficient. This efficiency will afford your agency the time and resources to focus on what's truly important - delivering value to your clients.

Step 4: Conduct a Marketing Strategy Assessment

The fourth step is to conduct a Marketing Strategy Assessment. This assessment will allow you to define the future state of marketing capabilities for your clients. With this understanding, your agency can develop these capabilities and control them, leading to improved outcomes and client satisfaction.

Step 5: Implement, Learn, and Iterate

Lastly, implement the strategy, learn from the outcomes, and iterate. The journey to radical growth is not a linear one. It involves continuous learning and improvement. Use the insights from the Marketing Strategy Assessment to improve your strategy, and don't be afraid to iterate.

With these steps, you are now ready to implement the Strategy Led Sales Process. Remember, the path to success is steep and fraught with challenges, but the view from the top is worth it.

As we wrap up this book, it's essential to remember that this is not the end of your journey but the beginning. The world of marketing is ever-changing. Staying ahead of the curve requires continuous learning, adaptation, and growth.

This book has provided you with the knowledge and tools to transform your sales process. However, the true transformation begins with you. Embrace the change, implement the strategy, and see your marketing agency grow in ways you never thought possible.

As you embark on this journey, remember why you started. Your passion, your purpose, and your potential are the driving forces behind your agency. Harness these forces, and there's no limit to what you can achieve.

It's time to reclaim your passion, reignite your purpose, and redefine your potential. The next step is yours to take. The future of your marketing agency lies in your hands. Here's to your success and growth. Here's to the prosperous future of your marketing agency.

ABOUT THE AUTHORS

Lane Smith



Lane Smith is a seasoned entrepreneur with a knack for transforming professional service companies into high-value organizations. With a career spanning over three decades, Lane has successfully built and sold multiple companies, leveraging his deep understanding of strategy development and execution to drive growth. His expertise in crafting compelling offers and establishing Monthly Recurring Revenue (MRR) models has made him a sought-after consultant in the industry. Lane's passion lies in empowering agency owners to scale their businesses by adopting strategic sales processes, ensuring they not only survive but thrive in the competitive landscape of marketing services.

As a co-author of this book, Lane brings his wealth of experience to the table, offering actionable insights and a step-by-step guide to building a Strategy Led Sales Process. His approach is characterized by a focus on long-term relationships and strategic partnerships, principles that have guided him through his successful entrepreneurial journey. Lane's vision is to democratize the strategies that led to his success, making them accessible to marketing agencies aiming for radical growth.

David Daigle



David Daigle stands at the forefront of marketing strategy, having pioneered a model that seamlessly integrates traditional marketing principles with modern digital tactics. Running a marketing agency that exemplifies the effectiveness of the Strategy Led Sales Process, David has become an expert in conducting marketing assessments, creating roadmaps, and crafting strategies that resonate with the SME market. His hands-on experience and innovative approach have not only accelerated his agency's growth but have also helped hundreds of marketing agencies replicate his success, generating millions in revenue.

In his role as co-author, David shares his in-depth knowledge and practical experiences to guide readers through the intricacies of implementing a successful marketing strategy. He believes in the power of education and collaboration, often participating in workshops and seminars to foster a community of like-minded professionals. David's commitment to excellence and his ability to translate complex marketing challenges into straightforward, actionable plans make him a valuable mentor to those looking to enhance their agency's capabilities and achieve sustainable growth.

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