

AGENCY GROWTH

TOOLKIT





ABOUT DIGITALMARKETER

DigitalMarketer combines the largest community of digital marketing pros on planet Earth with the best dang digital marketing training you'll find anywhere.

We're on a mission to double the size of 10,000 businesses and want to help you:

Drive More Traffic,

Produce Stellar Content,

Write Emails That Generate Clicks,

...and

Become the Smartest Marketer in the Room.

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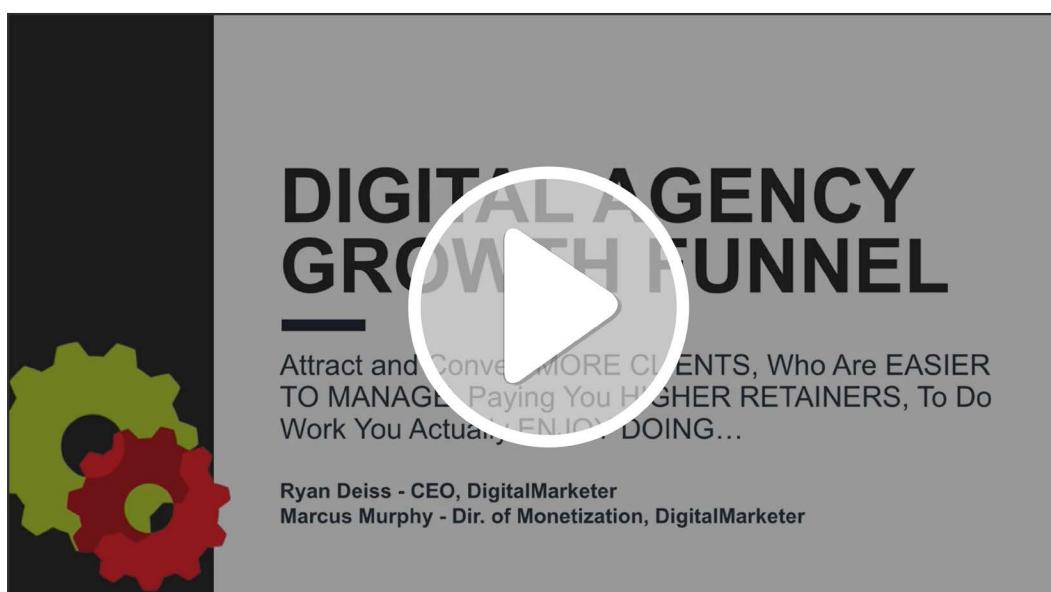
AGENCY GROWTH FUNNEL VIDEO

Join DigitalMarketer's CEO, Ryan Deiss, and Director of Monetization, Marcus Murphy, as they show you how to attract and convert more clients, who are easy to manage, and pay you higher retainers, all while doing work you actually enjoy doing.

In this video, we'll cover:

- The exact 7-step client attract, convert, and onboard process we use here at DigitalMarketer
- The simple "checkbox tool" that converts prospects into clients like crazy
- A simple little "trick" that filters out virtually all the "lookie-loos" and "crazies" who have unrealistic expectations
- The secret to prospecting like a generalist

....and MORE!





THE **PERFECT AGENCY PROPOSAL TEMPLATE**

A complete proposal template to **turn your conversations** with leads and clients **into conversions**.

INTRODUCTION

Tired of spending tons of time creating proposal after proposal?

Tired of trying to find a format that actually turns into business? Whether your agency is just getting started or you've been at this for years, the Proposal Template will save you time and help you turn your conversations into conversions. Fill out this template to turn existing prospects into clients and get your existing clients to start spending even more. Use this design as inspiration for your own proposal, or download the editable document from the end of this guide and customize it for your business.

What's The Goal?

The goal of this proposal template is to get your prospects and clients to sign on for you to perform your marketing services for their business.

Who Should You Send This To?

- Existing Prospects
- Existing Customers

Who Should You Not Send This To?

- Cold Leads





[Your Logo Here]

[Business Name]

[Proposed Service Title]

Prepared For: [Client Name]

Prepared By: [Your Name], [Your Title]

Date: [Submitted Date]



OVERVIEW AND GOALS

Dear [Client Name],

[Open this paragraph with an overview of why it's important for your client to use your agency as a tool for success. Running a business is hard, and being an entrepreneur comes with its fair share of challenges, so use this section to explain how you as a partner will be able to alleviate the pressures and challenges that come with entrepreneurship through your services]

During our sessions, we will discover: [Insert 4-5 bullet points of what your proposed service will accomplish]

- [Bullet Point 1]
- [Bullet Point 2]
- [Bullet Point 3]
- [Bullet Point 4]
- [Bullet Point 5]

These are the key things that we will focus on and ensure [Goal of proposed services].

We are excited for the opportunity to work with you, and we look forward to your success.

Sincerely,

[Your Signature]

[Your Name]

[Your Title]

[Your Company]

[Your Address]

[Your Website]

2



SCOPE OF SERVICES

“

[Relevant quote that inspires you and your business]

”

[Title of Proposed Service]

[Use this initial sentence to lead in to the three biggest ways in which your proposed service or services will impact your client's business]

- *[Impact 1]*
- *[Impact 2]*
- *[Impact 3]*

[Include a few sentences here outlining your company's philosophy for achieving success in this particular area]

*[Your Address]
[Your Website]*

3



In this [Proposed Service], we will provide a comprehensive plan which includes:

- [Action Item #1 with comprehensive description]
- [Action Item #2 with comprehensive description]
- [Action Item #3 with comprehensive description]
- [Action Item #4 with comprehensive description]
- [Action Item #5 with comprehensive description]

Upon completion of this comprehensive plan, we will review the recommendations made and prioritize any outstanding tasks or deliverables that need to be completed prior to moving to the next phases which will include [next steps in completing your proposed services].

Accountability & Execution Plan

Throughout [Proposed Service], we will be providing recommendations, but what good are recommendations if we don't prioritize or execute? Before we proceed with [Proposed Service], we will identify mission critical tasks, assign ownership, and create due dates for the tasks so that they are complete. As we build this out, more ideas, tasks, etc. may come up. We have a system to make sure that these ideas are documented and noted so that we can stay on task, but we will revisit these action items as others are completed.

Also note that while we are working through these phases, it is imperative that we get feedback from your team in a timely fashion so that we can keep things moving forward.



TIMEFRAME

To complete the work outlined in the project scope, we'll need approximately [Estimated Timeframe] from beginning to end, depending on when we receive feedback at each milestone. Upon signing the proposal we are prepared to start work immediately.

Phase	Day
[Description of phase]	# - #
[Description of phase]	# - #
[Description of phase]	# - #
[Description of phase]	# - #



YOUR INVESTMENT

Below is the budget we've estimated based on the scope of services outlined earlier in this proposal. If you have any questions about our pricing or need to increase or decrease the scope of work, please leave a comment and let us know.

Core Budget

Description	Rate	Qty	Price
[Title of Proposed Service]	[Dollar Amount]	[#]	[Dollar Amount]
[Title of Proposed Service]	[Dollar Amount]	[#]	[Dollar Amount]
Total Cost			[Dollar Amount]





WHY US?

[Use this section to explain what separates you as a company and how you take action to accomplish this]



[Your Address]

[Your Website]

7



TERMS

Date: [Date Submitted]

Between “us”, [Your Company], and “you”, [Client’s Company]

You, [Client’s Company], are hiring [Your Company] located at [Your Address] to perform consulting and coaching services for the estimated total price of [Cost of Services] as outlined above in our fee schedule.

[Place your company’s terms and conditions here]

[Your Address]
[Your Website]

8



NEXT STEPS

1. Please read the contract on the previous page to make sure you understand all the details involved with us working together. It's really important to us that everything is transparent and understood from the beginning so that we lay a solid foundation for a great working relationship.
2. If you have any questions at all, please let us know.
3. Once you feel confident about everything and are ready to move forward, please sign below.
4. Once we receive notification of your acceptance, we'll contact you shortly to sort out next steps and get the project started.
5. We'll email you a separate copy of the signed contract for your records.
6. If you'd like to speak to us by phone, don't hesitate to call [Your Phone Number].

[Your Name]

[Your Company]

[Client Name]

[Client Company]

[Your Address]

[Your Website]





**Download the Editable
Proposal Template**



THE APPOINTMENT GETTER

TEMPLATE



DIGITAL MARKETER

INTRODUCTION

Tired of sending emails to your prospects and clients, only to be met with silence?

Whether your agency is just getting started or you've been at this for years, the "Appointment Getter" template will help get your prospects and clients to start requesting appointments today. Follow the steps in this template to turn existing prospects into clients and get your existing clients to start spending even more.

What's The Goal?

The goal of this email or text message series is to get your prospects and clients to schedule a strategy session with you.

Who Should You Send This To?

- Existing Prospects
- Existing Customers

Who Should You Not Send This To?

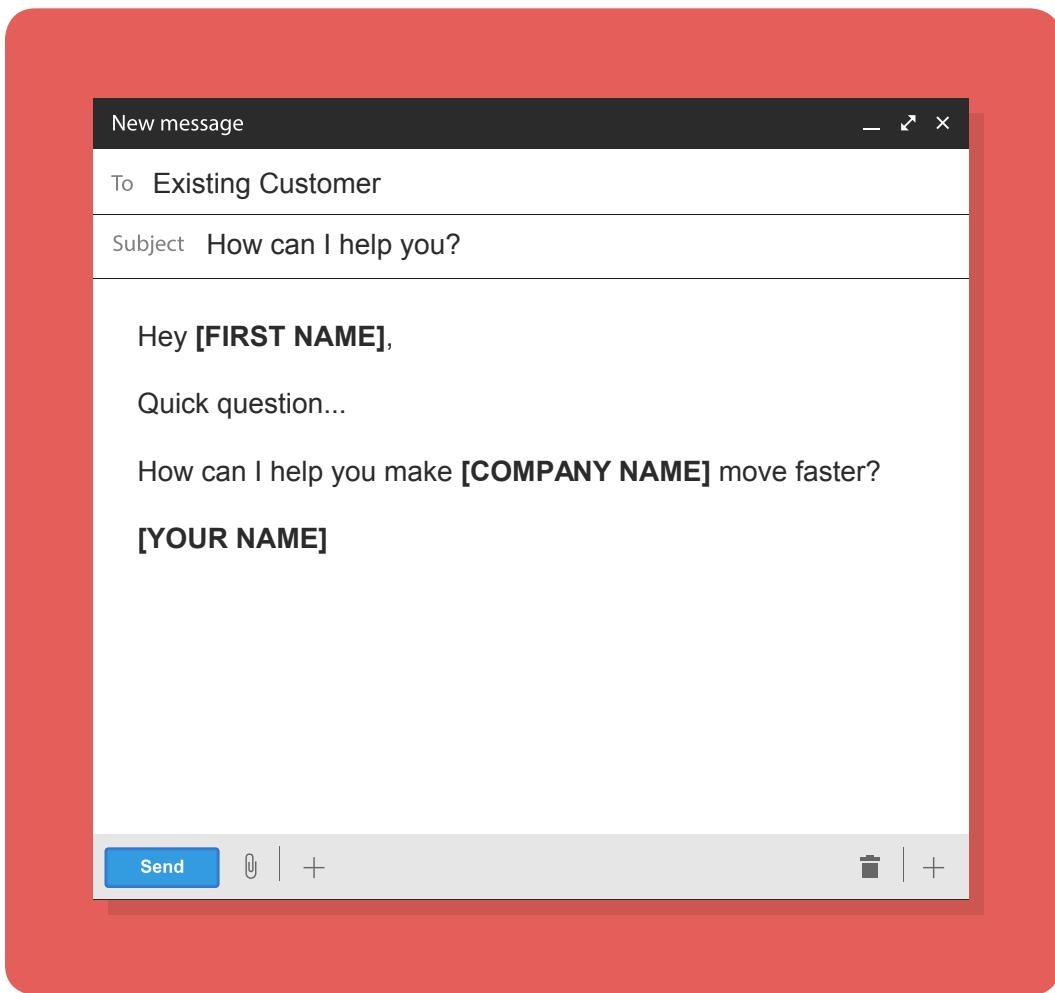
- Cold Leads



THE TEMPLATES

STEP 1: OUTBOUND MESSAGE

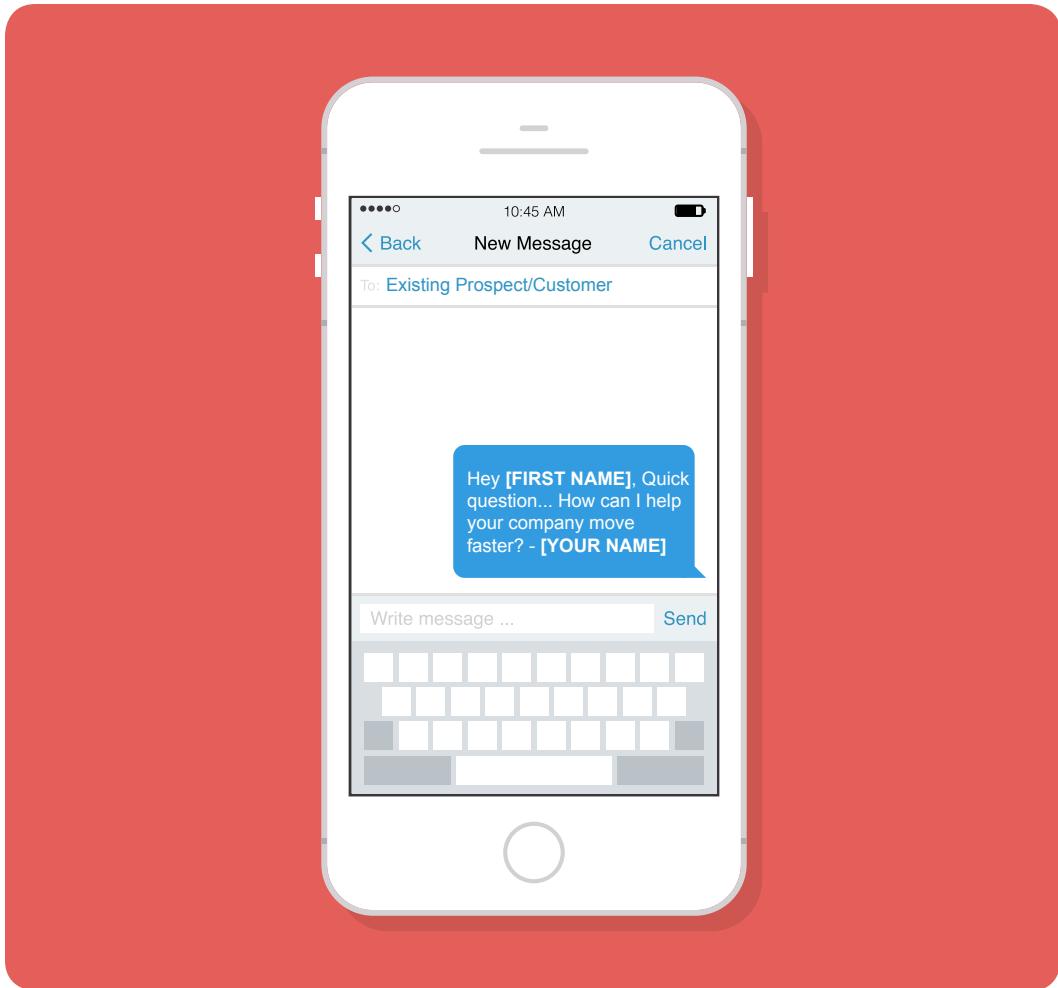
Send this to all of your existing prospects and customers that you're looking to book an appointment with.



Alternative Subject Lines

- Checking In...
- Quick Question...





STEP 2: FOLLOW-UP REPLY

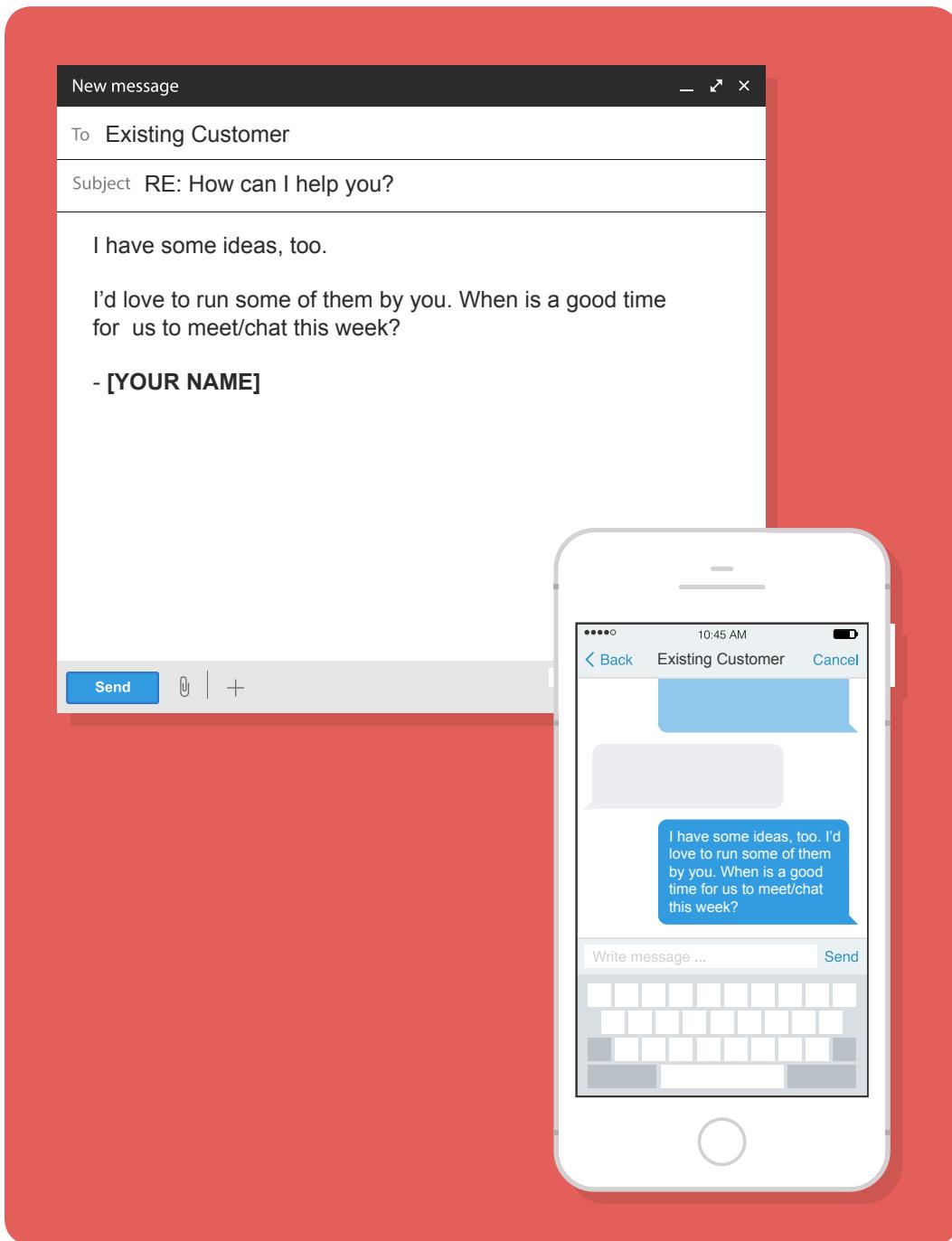
Send this message to everyone who replies to your outbound message.

The follow-up message should continue to build on the curiosity by hinting at the fact that you have some ideas already put together but it still needs to remain brief to keep the conversation flowing. Two optional replies are included based on how your prospect responds to the first email.



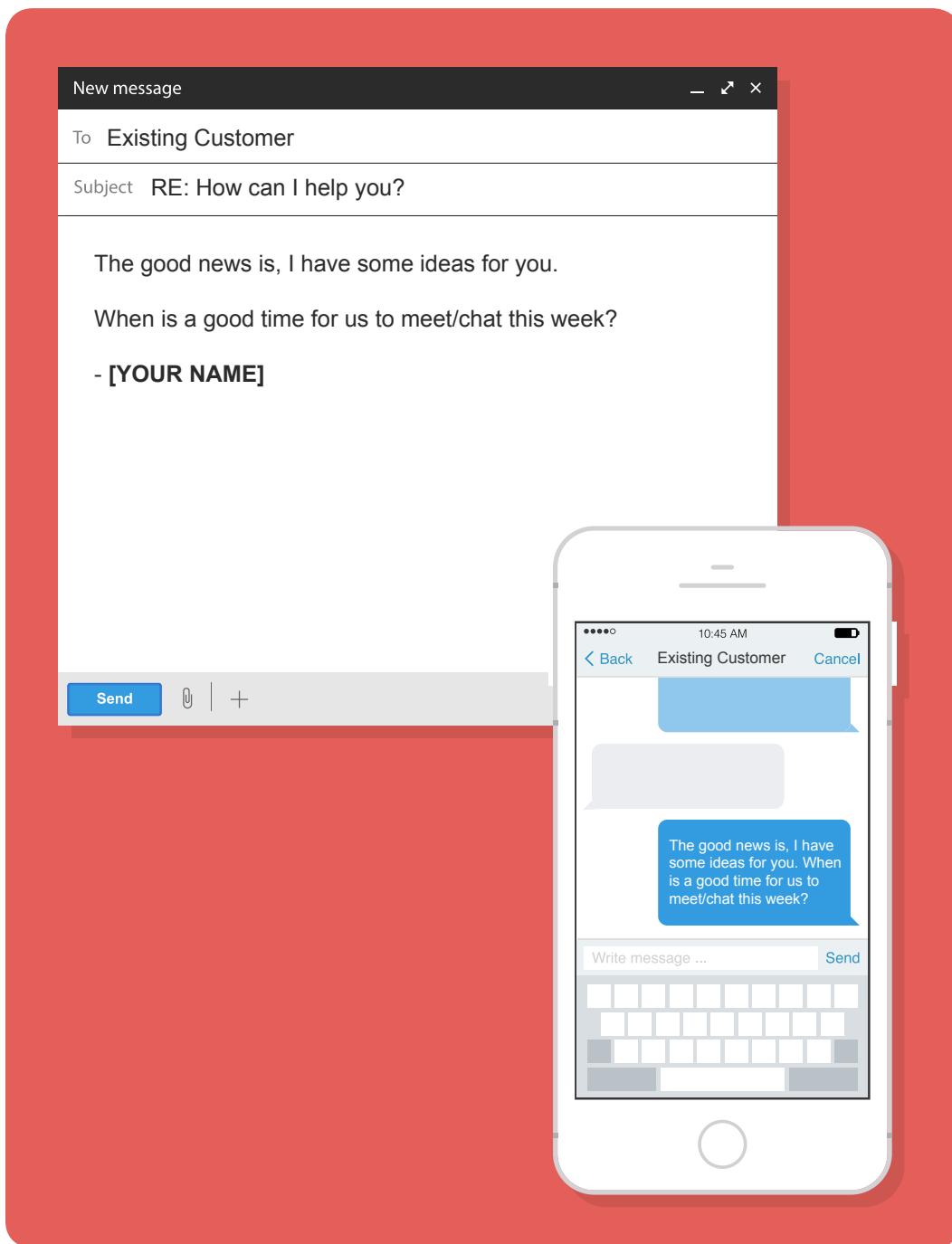
OPTION 1:

Use this option if the prospect mentions some ideas of their own.



OPTION 2:

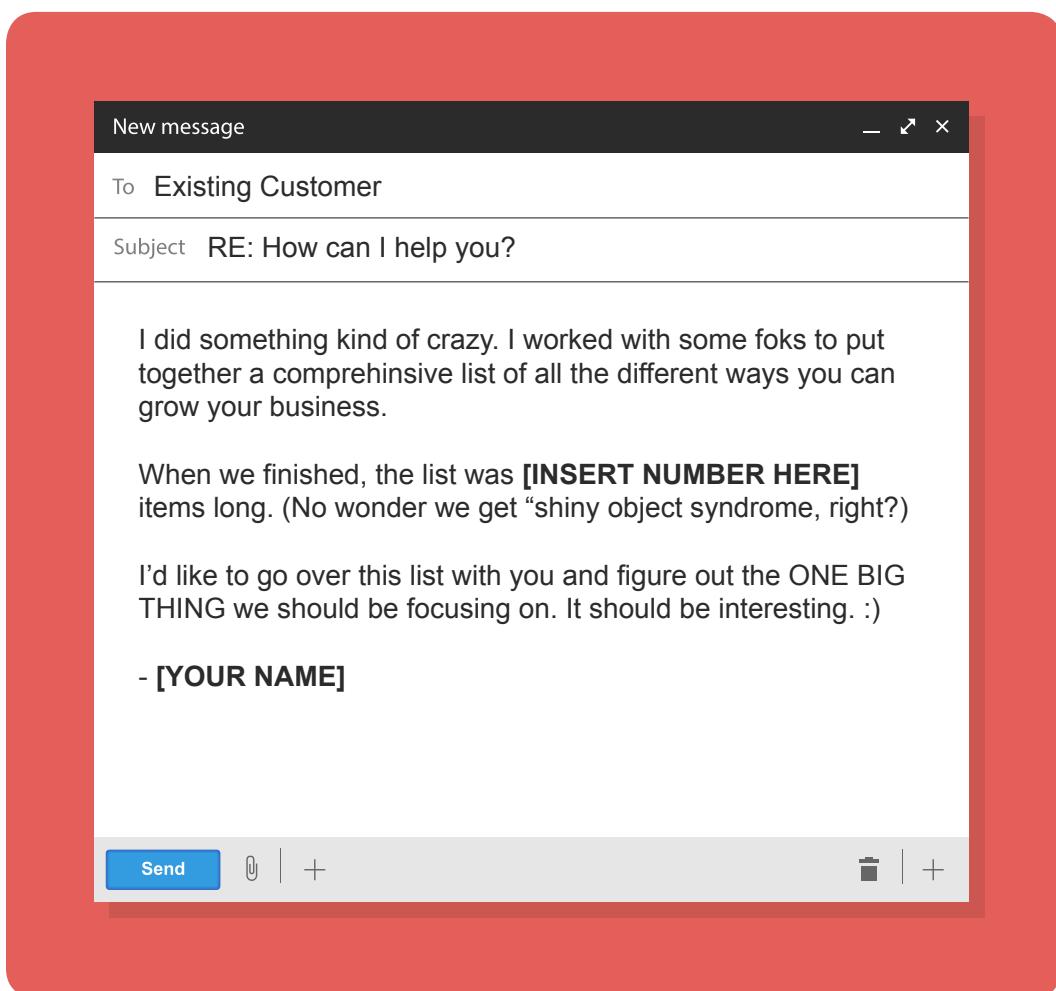
Use this option if the prospect doesn't mention any of their own ideas.

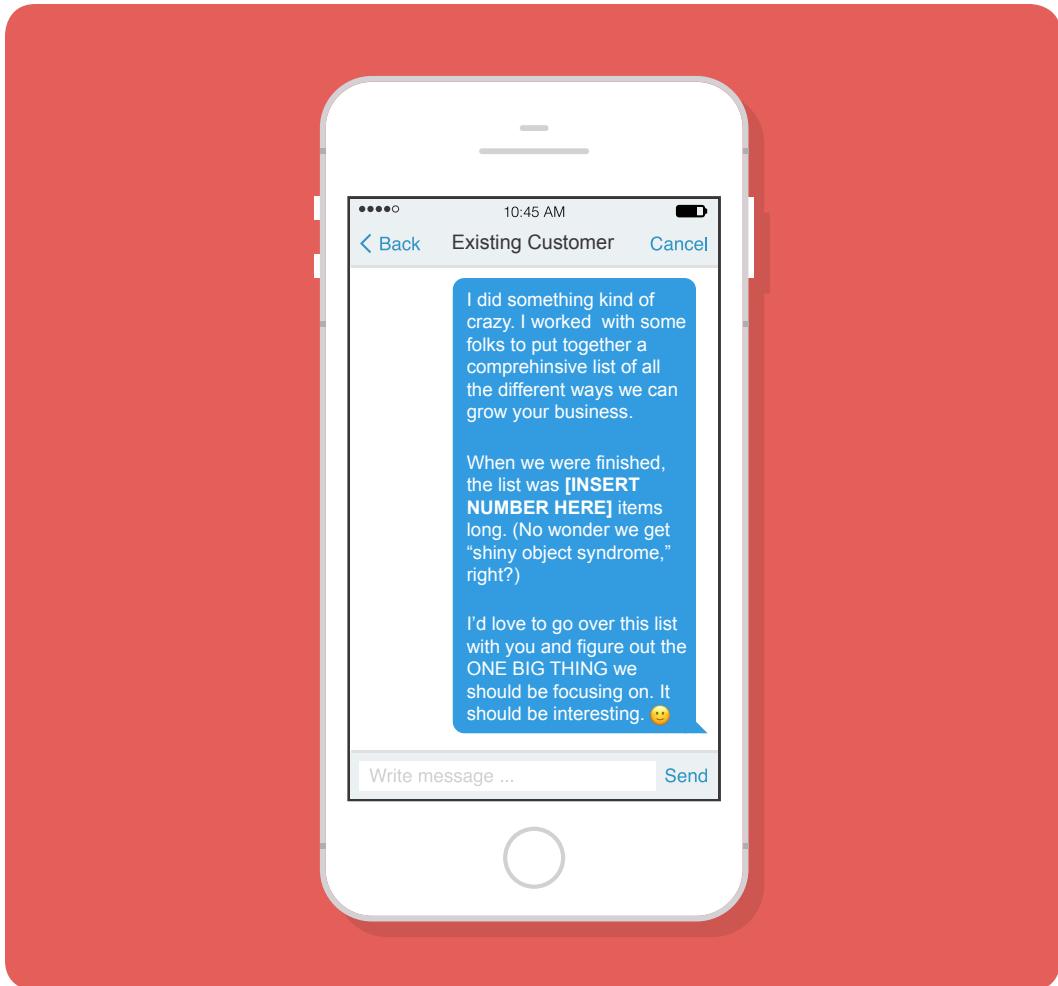


(OPTIONAL)

STEP 3: ADDITIONAL INFORMATION REPLY

Hopefully this email is not needed because the previous email resulted in a meeting, but if your prospect insists on knowing more, you can send a reply with something like this...





CLIENT INTAKE QUESTIONNAIRE



DIGITAL MARKETER

INTRODUCTION

Far too often we see agencies and consultants bringing clients on without any particular process for how a new client is onboarded. **THIS IS A BIG MISTAKE.** Onboarding effectively is one of the most critical steps in creating long-term, high-value relationships with your clients.

But, why?

1. When you're bringing a client on they're excited about what you can do for them and they're ready to talk. Six months down the road when they're excited about something else it will be much harder to ask these onboarding questions.
2. With an effective onboarding process, you might learn that the direction you decided to go initially isn't actually the right place to start.
3. We are most interested in people who are most interested in us. If you ask a bunch of questions about the client early on, they are going to continue to be really interested in you because you're really interested in them.



4. Onboarding questionnaires establish authority. When you establish authority early on, your clients will trust you more throughout your relationship.

The list goes on and on...

After years of testing, we've identified **15 of the best onboarding questions** you can ask a new client that build your authority and establish a relationship that will work to increase the lifetime value of every client that you bring on.

These questions are meant to be read as a script, making it easy for anyone within your company to onboard new customers.

Note: These questions are designed for new clients who have already signed on with you.



THE ONBOARDING QUESTIONS



1.

Please take two minutes and give me a little background of your business and a brief overview of the products and services you offer.



2.

What differentiates you from the competition? What's your "**Unique Selling Point**"?



3.

In a perfect world, what are you hoping we can accomplish together? What's **YOUR** desired end result?



4.

What is your core/flagship offering? What's the product or service that you're **most proud** to sell and deliver? What do you hope most people will buy from you?





5.

How much do you charge for this product/service?



6.

How are you currently generating the bulk of your traffic, leads, and customers?



7.

How much traffic do you get on a daily, weekly, or monthly basis?



8.

How many new **leads** are you adding each month?



9.

How many new **customers** are you adding each month?



10.

Describe your current customer...





11.

Is this your **IDEAL** customer or just the one you're getting? If not, also describe your ideal customer.



12.

What's the **one thing** you can tell or show someone that will make them say "WOW!!"?



13.

If you had **two minutes** to impress someone, what would you say, show, or give them that would blow their mind?



14.

What's the **one big thing** your prospect wants more than anything else?



15.

What's the one big thing that's keeping your customer from achieving their **desired end result**?

Ex. Drive the ball 20 yards further (golfers), lose 10 pounds in 10 days (dieters), generate 10 inbound calls a week (salespeople), free shipping (ecommerce), etc.



The Perfect Pipeline: How to Fill, Nurture, and Convert Leads to Grow Your Digital Marketing Agency

Written by: Beau Haralson

Remember the Elf Yourself campaign in the early 2000s?

123 million people Elfed themselves, pasting their faces onto dancing elves to get into the holiday spirit.



But here's the thing...

This is the perfect example of a viral branded campaign that doesn't really work.

I was part of the team at Office Max that created the campaign, and I'll be first to tell you — while it was fun and engaging, and a massive success in terms of virality — it didn't sell a lot of paperclips.



Worse still, no one thinks of Office Max when they think about the campaign. Most people have no idea the app was created by an office supply store. And if they do, the campaign simply puts Office Max in the friend zone.

Sadly, that's what a lot of marketing today does. It doesn't inspire love and ongoing sales. It sparks little more than a lukewarm friendship.

To build your marketing agency, you don't need viral content and other bright, shiny marketing tactics being promoted today.

What you need is the perfect pipeline.

I know, because I walked this same path growing my marketing agency, Clymb. On my journey, I made a lot of mistakes. It wasn't a perfect course getting to the perfect pipeline. But if you learn from my mistakes, you'll likely get there in half the time, possibly shaving 2 years of heartache and \$3–5k of investment off your own journey.

How to Build the Perfect Pipeline for Your Agency

You may be reading this article because there's a mountain you want to climb. There's something you want to accomplish, but it's hard and you're looking for guidance.



If that's you, I want you to understand something: There's no one way to climb a mountain and reach your business goals.

My story will give you some guidance. But I want you to realize that this is only one path up the mountain. I'll show you what I've done, but you need to adapt these lessons to your own brand.

To begin, I'll show you how we started selling our services. Then I'll tell you about the turning point, the moment when I realized how precarious our success was. And I'll wrap up by telling you how we adjusted course to smooth our climb and scale our growth.

The secret is to balance momentum and recklessness: forward momentum to climb but being careful to avoid a wipe-out.

Balancing Momentum and Recklessness

When I began the Clymb agency, we had 3 areas of focus: content creation, premium content, and lead generation.



3 AREAS OF FOCUS

Content Creation

Clymb makes the content creation process easy and efficient. Our team provides all the support you need to create remarkable content that attracts and converts your prospects. We create the content in partnership with you, enabling your through leadership and expertise in your industry. We handle all inbound content including blogging, website copy, premium content, videos, email content, social media, and more.

Premium Content

We'll help you optimize for search engines by understanding your keywords and implementing all on-page SEO best practices. By optimizing for your buyer personas, we'll create a more targeted experience that engages your ideal customer and moves them down your sales funnel. We'll also help you optimize for share ability to attract more prospects through social media and build website authority.

Lead Generation

As inbound marketing matures, marketers need to get more creative in their lead generation efforts. Rather than just depending on ebooks, Clymb conceptualizes and creates remarkable offers that prospects actually want to convert on. We'll help you develop your landing pages and calls-to-action, monitor the analytics, and use data to maximize results.



A handwritten signature of the word "Clymb".

We also offered 3 monthly packages: Fast, Faster, and Fastest.

MONTHLY AGREEMENT OPTIONS

Fast

The Fast program is an entry level package designed for companies that are new to inbound marketing and seeking to increase their website traffic and leads. "Done for you" content production, including:

- 4 Blogs written for you
- On Page SEO
- Content Calendar
- Social Media Strategy
- 1 Email Nurturing Sequence
- 1 Premium Content Piece

Faster

The Faster program is designed for companies in need of a completely outsourced marketing team to drive growth. "Done for you" content production, including:

- 8 Blogs written for you
- On Page SEO
- Content Calendar
- Social Media Strategy
- Social Media Execution
- 2 Email Nurturing Sequences
- 2 Premium Content Pieces
- Paid Search Initial Set Up and Basic Management

Fastest

The Fastest program is ideal for companies with aggressive growth goals and includes campaigns that include high levels of content production with fully integrated activities across social media, search, influencer marketing, custom analytics, and more. "Done for you" content production, including:

- 12 Blogs written for you
- On Page SEO
- Off Page SEO
- Content Calendar
- Social Media Strategy
- Social Media Execution
- 3 Email Nurturing Sequences
- 3 Premium Content Pieces
- Paid Search Initial Set Up and Advanced Management



A handwritten signature of the word "Clymb".

*Does not include monthly ad spend on paid search ~\$2.4k



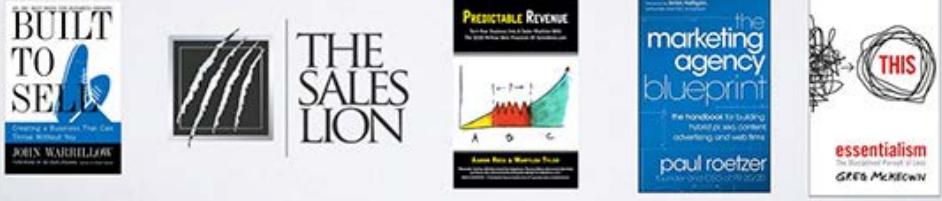
As you can see, our focus was inbound marketing. We were a Hubspot agency, and our services were simply a reproduction of Hubspot's strategy.

None of this was bad, but it wasn't the perfect fit for us. Then, to exacerbate the problem, we were a bit "partner happy."

EARLY PARTNERSHIPS



EDUCATION AND TOOLS



As an agency, you may be in the same boat: young, hungry, trying to learn, and searching for the golden ticket to facilitate growth.

Don't do what we did.

When you adopt partners and their systems without contextualizing them to your agency's brand, you lose momentum. And when you adopt too many partners, you



muddy your message, again, sapping momentum because your strengths don't stand out as easily.

You can see this in our early growth pattern.

We had moments when we were growing and figuring things out, but something would happen, and the service level wasn't where it ought to be, so we'd lose a client or an account manager or some other setback.



For me, as an entrepreneur wanting to grow a company and take care of people, this was incredibly stressful.

We were growing, sure, but we kept losing momentum. And the upward climb was grueling.

Still, within the first 18 months, we hit first million in top-line revenue.



But then life happened.

I was due to get on a plane and fly to Inbound when my wife's water broke. Exciting news, right? Wrong. She was only 7 months pregnant.

For the next 6 weeks, we lived at the hospital. I did business in the evenings from a hospital room. All my attention went to taking care of my wife and newborn son.



Finally, things got back to normal, but when the dust settled, it was time for a report card. Those 6 weeks were a good measure of whether my agency could survive if anything happened to me.

And sadly, it failed.



- We lost a few clients.
- Leadership needed to be in the room almost all the time.
- The systems and people were not in place for the business to run without its founders.

I came face to face with the realization that what we were doing was not sustainable. It would be reckless to continue doing business as we'd always done it. We needed a better operating system.

Getting Out of the Friend Zone

It was then that I read Ryan's article on [Customer Value Optimization.](#)

That's when I realized we'd been doing friend-zone marketing. Blogging, email optins, and other routine marketing tactics had helped us grow, but the path had been harder than it needed to be.

A critical component was missing. Namely, the [Tripwire](#).

Without it, we struggled to move people out of the friend zone and into a dating relationship. But we didn't know where to begin.

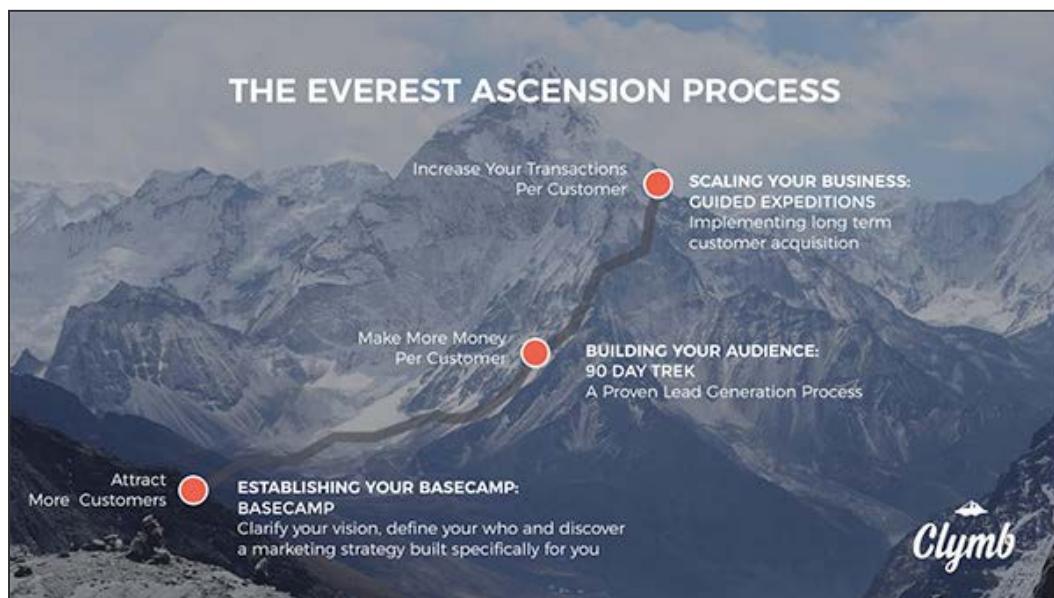


So, we flew to Austin, met with the DigitalMarketer staff, and completed our Certified Partner training.

Now, back in Colorado, we sat down to a blank whiteboard and rebuilt our agency's offerings from scratch. Except this time, instead of adopting a partner's marketing plan outright, we contextualized the process to who we are and what we do.

Creating an Ascension Path

We started by creating what we called The Everest Ascension Process.



Instead of selling individual services, in a graphic that perfectly fits the Clymb brand, we show customers the 3



levers they can pull to grow their business. Beside each is its corresponding service package.

In a sales call, prospects quickly identify their biggest need. I only need to ask them, "Where do you see yourself fitting on this mountain?"

I want you to notice something else. This graphic isn't a brochure. It's a sales tool.

When we use this piece in a sales call, there's no hard sell. In fact, our clients sell themselves, and we move through the sales conversation faster.

Building a Compelling Tripwire

The second piece we developed as a Certified Partner was our Tripwire. If you remember, this was missing from our initial marketing plan, and not having it meant we were destined for the friend zone.

Now, the Trail Map is our Tripwire, and from there, customers can choose from two options: Basecamp or the Guided Expedition.



WE GIVE THREE ENGAGEMENT OPTIONS



TRAIL MAP

A marketing plan that gives you a clear strategy and direction to grow your business.



BASECAMP

Build your brand online via branding, a website, or digital media.



GUIDED EXPEDITION

Build and execute the perfect long-term digital marketing strategy to grow and scale your business.

The Basecamp is a website, branding, and basic digital media. The Guided Expedition is a growth strategy, offered in 3 different categories:

- Ranger: We're the consultant, giving you strategy and guidance, but you do the work.
- Guide: We work together to implement the strategy.
- Sherpa: A completely done-for-you service.

But let's get back to the Tripwire...

We call it the Trail Map, and it was developed as a way to productize our strategy service.

Trail Map is a 1-day workshop that's completely unique in our industry.



It sets us apart, helps us build lasting relationship with our prospects, and weeds out the people who aren't a good fit for our agency.

Essentially, we partnered with a local mountain bike shop for these events. They provide top-of-the-line mountain bikes. We provide the prospects. And we offer a day on the mountain, making memories. Then, at the end of the day plus 2 follow-up calls, we talk about how their business can climb the mountain to reach their goals.

In other words, strategy.

It took time to perfect this approach. And it required us to strategically fit the customer journey to our brand and our strengths. But the results have been nothing short of amazing. So amazing, in fact, that Clymb was later acquired by Human Design.

Reverse Engineering Success: 5 Tips to Grow Your Agency

Looking back, I realize that had we understood the dangers of friend-zone marketing, we'd have hit our mountain peak in half the time, shaving 2–3 years off our growth curve.



There were a lot of missteps that could have been avoided. And we should have *begun with the mindset of building an agency so valuable that someone would want to buy it.*

So how do we reverse engineer success? I break it into 5 essential tasks.

1. Find Great People

The 3 types of people who will help you grow your business are mentors, referrers, and your team. These are the people who will help you grow your business: co-founders, contractors, and employees.

These 3 groups are the people you need to invest in.

But don't overdo it. You can run a lean operation of just 3-5 employees, then use strategic partnerships and contractors to get specific tasks done. This gives you a good margin and forces you to be disciplined.

2. Productize Your Services

You need a Tripwire. Period.

Identify the thing that makes your agency unique. Sell that and nothing else.



Tell a story with your sales presentation. You need to be both prescriptive and descriptive, so people walk away knowing who you are and what you do and how you differ from everyone else. For us, the story was about climbing a mountain. It will be something else for your brand.

Make it easy for your customers to sell themselves by positioning themselves on the grid of your offerings.

Then make it easy (and fun) to get started with your agency. When our Tripwire was a seminar or a happy hour, it wasn't as successful. When we set up our first mountain-bike event, we had double the prospects we anticipated. For us, this worked well because we're located in a destination spot, and it fit the Clymb brand perfectly.





3. Treat Your Agency As a Client

Build out different ways for clients to find you and move through your customer journey.

Our funnel starts with referrals, outbound marketing, and inbound marketing. Because our Tripwire is an event, it's easy to sell and easy to promote. Here, we aren't trying to sell value, just the event itself.

From the Tripwire, we offer a 90-Day Trek, our first upsell. If prospects say no, we offer a downsell, our Demo Day, which is a free event. Then, we follow up with leads through video and email.



The idea is to treat your agency as a client, finding your unique story, the things that make you stand out. Then create a funnel with a Tripwire that helps you prequalify prospects and quickly convert them into paying customers.

4. Sell Your Products the Right Way



It's important to evaluate your sales process as well as your offerings. Don't just repackage a partner's offerings. Contextualize them by fitting them into your brand. Tweak them to reflect your unique strengths.

Always keep in mind, if all you're doing is selling products, anyone can do that. If you're selling empathy, or relationship, you'll need more nuance.



It's not about your sales pitch alone but your ability to connect with your prospects.

True growth happens if you can get your prospects to sell themselves — something I call “inception.” For this to happen, you need to develop a sales process that gets prospects to sell themselves.

5. Take Care of Your Employees

I learned this lesson by being a dad...

Your home base matters. If you don't take care of your agency family, you won't be able to take care of your clients.

First, train your employees so they know how to do the work that's required of them. Use [DigitalMarketer Lab](#) to do it. It's the best investment you can make in your agency — by growing your employees' skills, it's less necessary that you be present for the day-to-day operations. (That's a good thing!)

Second, spend time with your employees. We do casual driving or walking meetings as I run errands. This allows us to build relationship and stay connected.



Finally, defend them. When there's a problem, assume your client is wrong and your employee is right. That will build loyalty, so you can keep your employees longer.

Bottom Line

Most marketing tactics you read about today are just bright, shiny objects. They may create viral campaigns, but they'll likely put you in the friend zone.

To grow your business in less time and with less investment, you need to build an ascension path and create a powerful Tripwire.

You can double the size of your agency. But learn from my mistakes. Work smarter, not harder, and you'll enjoy the journey up the mountain.



Build a Steady Stream of Clients in 30 Minutes a Day Using This One Free Tool

Written by: Ted Prodomou

If I were granted three wishes, I'd wish for:

1. More clients
2. More repeat buyers
3. More referrals

But how do you turn wishes into reality?

You create a system with the resources at your disposal. For the past six years, I've been using a FREE online tool to consistently grow my online advertising consultant agency business.

It's an eight-step process and takes thirty minutes a day.

And you can put it to use, too.

No more roller coaster revenue. No more stressing about cash flow.

Just a steady stream of high-value clients, repeat buyers, and lots of great referrals.

Want to know what it is?



It's LinkedIn.

Yes, that "boring" LinkedIn you thought was just a place to find a new job.

I personally use these LinkedIn strategies and the eight steps I'm about to show you to create 10-15 sales appointments every week and a very comfortable six-figure business in just thirty minutes a day.

NOTE: Before we begin, the key to success with this eight-step strategy is simple:

Pretend you're sitting across the table at Starbucks with your LinkedIn connection and focus on helping them solve their biggest business challenge. No selling, just show genuine interest in helping them with no expectation of them returning the favor.

Ready to get started? Let's go!

Step 1. How to Identify Your Ideal Customer Avatar

To create a LinkedIn profile that generates a steady stream of high-end clients, you first must start with your customer.



Who are you looking for?

If you don't know who you are looking for, how will you know when you find them? To create a steady cash flow for your business, you need to know who your ideal client is, what keeps them up at night, and where to find them.

To do that, let's identify your ideal customer.

Start by looking at your current customer list and find the top 20% who spent the most money with you last year. Throw away the rest of the list because 80% of your revenue is coming from the top 20%.

Use the [DigitalMarketer Customer Avatar Worksheet](#) to create your ideal customer personas using the characteristics of your top 20%.



CUSTOMER AVATAR WORKSHEET

Company/Product Name:

GOALS AND VALUES
Goals:
Values:

Name:

Age:

Gender:

Marital Status:

#/Age of Children:

Location:



CHALLENGES & PAIN POINTS

Challenges:

Pain points:

SOURCES OF INFORMATION
Books:
Magazines:
Blogs/Websites:
Conferences:
Gurus:
Other:

Quote:

Occupation:

Job Title:

Annual Income:

Level of Education:

Other:

OBJECTIONS & ROLES
Possible Objections:
Role in the Purchase Process:



Once you know who you're looking for, you can figure out...

Step 2. What Problem Do You Solve for Your Customers?

This comes from the Challenges and Pain Points section of the Customer Avatar Worksheet. Identify 3-5 challenges your prospect is facing.

It may look something like this when filled out:



CHALLENGES & PAIN POINTS

Challenges:

Our avatar is challenged with...

- Scaling and growing his business
- Finding, training, and retaining top marketing talent
- Keeping his marketing skills sharp while being CEO

Pain points:

Our avatar is pained with...

- Fear of losing business to competitors
- Fear of his agency falling behind the digital scene

Knowing the pain points and challenges your Avatar faces will help you identify what problem(s) you solve for them.

This will help you know the benefit you provide to your potential customers so you can go beyond the product or service you offer them and hit on what really matters: the end result and the feeling they'll get from the end result.

Remember, people buy end results. They don't buy products.

For instance, a person doesn't go to a hardware store to buy a hammer. They go to a hardware store to buy a



hammer so they can hang pictures of their loved ones and make their place feel homey.

Knowing the challenges and pain points your Avatar faces will help you know the end result your product or service provides.

And once you know the Avatar you're looking for and what challenges and pain points they may face, it's time for you to head over to LinkedIn and beef up your profile (or make one)!

Step 3. Creating a Client-Attracting LinkedIn Profile

"You never get a second chance to make a great first impression," is the famous quote from actor Will Rogers.

And the same goes for your LinkedIn profile.

According to a study by the International Data Corporation (IDC), 83% of business professionals look at your LinkedIn profile before doing business with you.

If your LinkedIn profile doesn't project that you're a professional within two seconds, they will click away.



Here are the six factors you need to optimize on your LinkedIn profile to make a great first impression that lets prospective customers know you can solve their problem(s):

A screenshot of Alex Mandossian's LinkedIn profile page. At the top, it shows his name, website (www.MarketingOnline.com), and a header image with the text "Conversion Secrets That Put Your Business in High Growth Mode". Below the header, there are six numbered callouts: 1. Background (1584 x 396 px), 2. Professional photo, 3. Clean name field (labeled "Alex Mandossian"), 4. Professional headline, 5. Company, Education, Location, Network size (MarketingOnline.com • UC Irvine, San Francisco Bay Area • 500+ connections), and 6. 1st Line of Summary. The profile also shows he is 1st in his network. At the bottom, there are "View in Sales Navigator" and "Message" buttons, and a note about being the "Warren Buffett of Marketing Online".

Let's examine the six factors you need to optimize on your LinkedIn profile in more detail so you can create a client-attracting LinkedIn profile.

1. **Grab their attention with your profile background.**

The first thing people see is your profile background header. This is valuable real estate where you can



grab people's attention and let them know how you help them. See how my good friend and client Alex Mandossian includes an action shot of him speaking and includes, "Conversion Secrets That Put Your Business in High Growth Mode," to quickly convey what he does, pique curiosity, and establish himself as an authority in his industry.



- 2. Use a professional headshot with a friendly, smiling face.** You do not want a blurry, cropped photo or a photo you would use on a social media platform like Facebook or SnapChat. If a professional headshot isn't in the cards for you, ask a friend to help you out and get some professional-looking shots.
- 3. Keep your name field clean.** Symbols, titles, and too many certifications can be distracting and make it harder for people to search for you by name. You want to make it as easy as possible for people to find you when they're searching for you or they're likely to abandon the search when you can't be located.



4. Turn your professional headline into an attention-grabbing, benefit-related statement.

By default, LinkedIn uses your current job title and company name in this section. If you search LinkedIn for “online marketing” over 150,000 people use that phrase in their profile and almost all of them are using their job title as their professional headline.



How do you stand out? Create a client-focused, benefit-related headline that grabs the attention of the profile viewer.

For instance, if my business is struggling and has plateaued at \$100,000 a year, when I see Alex’s professional headline I want to click on his profile to learn more about how he helps businesses move from 6 figures to 7 figures.



You get 120 characters in your professional headline so use them wisely.

Your goal is to create a compelling statement that is going to entice the viewer to click on your profile to learn more.

No selling in your headline, just get them to click and learn more about you.

Think about your professional headline as an online ad.

Perry Marshall taught me many years ago that the purpose of an online ad is not to sell your product or service. The purpose of the ad is to sell the click which leads them to your landing page where you begin the sales process.

Your LinkedIn profile is your landing page and sales letter where people get to learn more about you and your products and services.

5. Get at least 500 connections so it says 500+.

People perceive you as a serious business person when you have 500+ connections. You may only have 501 connections but people know you have over 500 so they perceive you differently.



Recently, I came across a LinkedIn profile where someone proclaimed himself as the “Godfather of Networking” and he only had 220 connections.

Really?

The Godfather of Networking can only muster 220 LinkedIn connections? His reputation was tarnished in my eyes and I didn’t trust anything else in his profile.

When I meet people at events and we exchange business cards, I immediately invite them to connect with me on LinkedIn while my name and face is fresh in their minds. Send them a message like “I enjoyed meeting you at the [Traffic & Conversion Summit](#) today and I would like to connect with you.”

6. Structure the first line of your Summary so it asks a provocative question which entices viewers to continue reading your profile.

Going back to the ad association, people click on your online ad then come to a landing page which starts with a headline. Treat the first line of your Summary as a headline that continues



the conversation you started in your professional headline.

I structure my Summary as a conversation between me and the reader, whom I just met.

Keep the Summary in first person and pretend you are having a cup of coffee at Starbucks with the reader.

When you first meet someone, you want to get to know each other. This isn't the time to sell to them. Focus on helping them get to know, like and trust you in the Summary.

So, you've created or beefed up your LinkedIn profile. What's next? Connecting!

Step 4. Using LinkedIn to Connect and Build a Relationship with Your Ideal Customer Avatars

To anyone I connect with, I like to send a friendly, non-salesy welcome message to my new connections. Here's an example of one of my welcome messages after we've connected on LinkedIn.



Robert Plank
Internet Marketer & WordPress Developer [View Profile](#) [Message](#) [Edit](#)

Hello Robert,

Thanks for connecting with me and I look forward to learning more about you and your business. If you would like to connect with anyone in my network, I would be happy to be a resource for you.

Just for fun, tell me something interesting about you or your business.

If you want to learn something interesting about me and my business, I created a page just for my LinkedIn connections at <http://tedprodromou.com/linkedin-friends>

Thanks again for connecting and if there is anything I can help you with, please do not hesitate to ask!

Ted Prodromou

www.tedprodromou.com
www.twitter.com/tedprodromou
www.facebook.com/tedprod
[\(415\) 233-7234](tel:(415) 233-7234)

P.S. I also have a free LinkedIn class for you where I show you how I create 5-10 appointments a week at <https://tedprodromou.com/free>

Notice I'm not trying to sell anything in my welcome message. My goal is to earn their trust by offering to introduce them to people in my network.

A few months ago, I added a line to my welcome message that has significantly increased engagement and led to conversations with my new connections.



It's, "Just for fun, tell me something interesting about you or your business."

When I ask people to tell me something interesting about themselves, 20% actually reply to my message and tell me something interesting.

On the flip side, when I don't ask a question or prompt them to tell me something interesting about them, only about 2% respond with a generic, "Thanks for connecting," or they send me a very long sales letter.

Including a simple question like this is a conversation starter which moves our relationship from complete strangers to acquaintances, like the response I received from a contact below.



An interesting fact about me: I've traveled to 37 countries. Have a great weekend ahead!

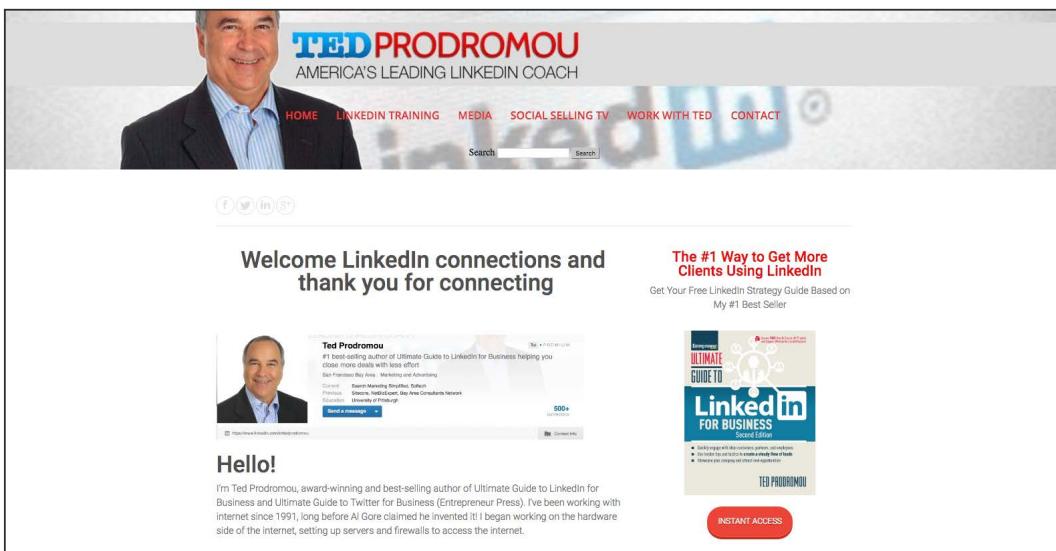
Cheers,
Philip

Next, in my welcome message, I offer to tell them something interesting about me and I drive them to my LinkedIn Friends page on my website.



Again, I'm not selling anything. My goal is to get them to visit my website so they can learn more about me and my business.

On my website, they can download a LinkedIn strategy guide and take a free one-hour LinkedIn class after opting in. I also pixel them for Facebook and Google ads so I'm building highly-targeted custom audiences.



At the end of my welcome message, I have my contact information and a P.S. where I offer my free LinkedIn course again.

Now it's time to keep in touch with your LinkedIn connections.



Step 5. How to Keep in Touch with Your LinkedIn Connections

In this step, you'll send short, inquisitive messages to your LinkedIn connections to pique their interest.

Every few months, or when I have a webinar or live event coming up, I send personalized messages to my connections.

For example, when LinkedIn makes big changes, as they did with the recent update, I reach out to people I know use LinkedIn daily, like sales professionals, to let them know I have new training.

Here are a few different personalized messages I've sent out that you can use for inspiration:

Are you still interested in learning how to use LinkedIn to get new clients?

Hi Sherrie,

I'd love to learn more about what you do and have you as a guest on Social Selling TV if it's a fit.



Hey David,

How are you? Just checking in to see how things are going.

I have new training for the recent LinkedIn desktop update and Sales Navigator. Let me know if your team would benefit from a short online training session.

Ted

Reaching out gets me top of mind and often starts a conversation or leads to a phone call to catch up, and it can pay off...

I reached out to my connection David with a short message and here's a snippet of our conversation that led me to close a deal to train 75 sales reps at a Fortune 100 computer software company:





HEY Ted -- great to hear from you. You know, the timing may be right. We have moved to a named account strategy -- so LinkedIn becomes incredibly powerful. Let me make a couple inquiries and get back to you,

3:21 PM

Mar 7



Hi Ted -- Would you be available to do a one hour webinar with our western regional sales team on Wednesday, March 22? The meeting is in Chicago. We have changed our sales model for this team to named accounts -- LinkedIn is indispensable to them changing from being farmers to hunters. What is the cost for doing this? Thanks.

David

The next interaction was with one of my first internet marketing mentors. I was just re-connecting with him to thank him for helping me get started in internet marketing.

Now I'm going to interview him for my Social Selling TV show and he's going to send me referrals when he comes across someone needing LinkedIn help—all because I reached out to him on LinkedIn.



 **Joshua Shafran**
We help authors, coaches & trainers build their own "Perpetu..." ***

Hey Joshua,

One of my first internet marketing courses was from you. I'd say you changed my life forever!

- Ted Prodromou

9:19 AM

Joshua Shafran is now a connection.

 Thanks for your kind words, Ted! I'm assuming the course you invested in was NPOD, yes? It's great to connect with you here on LinkedIn.

9:21 AM

Yes it was NPOD. My how time flies! What are you up to these days?

10:37 AM

 I know what you mean! I just realized that I released NPOD in 2003... holy crap... that's 14 years ago now (or 3 centuries back in Internet Years;-)...

I'd love to interview you on my Social Selling TV show too when you are ready since you got me into this career:-)

10:07 AM

Mar 1

 Sounds great! I'd be honored. Let's get something on the schedule in the next few weeks

3:25 PM

My calendar is at <http://tedprodromou.com/30>



Moral of the story, it never hurts to reach out.

Once you've reached out, it's time to...

Step 6. Get Your LinkedIn Connection on the Phone

Of those who respond to these messages, the next step is to invite them to schedule a short call to discuss their business challenges and how you may be able to help them.

I close all of my coaching clients via phone consultations/strategy sessions and I do this by asking one final question at the end of the phone conversation: "*Would you like my help?*"

For me, these phone calls have led me to close deals and create genuine connections, which leads to our next step.

Step 7. Building Your LinkedIn Profile's Authority by Solving Your LinkedIn Connection's Biggest Business Problem

At this point, the connection has become a client and we are performing our consulting services.



This is where you work your magic and use your expertise to help solve your clients' business problems.

When you solve one problem for them, there's a great chance they will hire you over and over to solve more problems.

Next, when the first project is complete, write a LinkedIn recommendation for them and describe how it was working with them.

Once they receive the recommendation, LinkedIn will prompt them to write a recommendation for you.

This is the easiest way to get great recommendations on LinkedIn, which will help you build your profile's authority and help your profile look that much more professional.

Recommendations serve as social proof, and there are few things more powerful than social proof.

Here are some of the recommendations I've given...



Recommendations	Ask to be recommended
Received (35)	Given (19)
 James Malinchak Featured on ABC's Hit TV Show, "Secret Millionaire" - One of America's Most In-Demand Keynote Speakers & Business Coaches <small>April 4, 2017, Ted was a client of James'</small>	Ask to be recommended  <p>I was introduced to James in 2014 by a mutual friend who invited me to the Big Money Speaker Bootcamp. I attended a welcome presentation the night before the event and James blew me away. I learned more in this pre-event presentation than I did at most 3 day conferences.</p> <p>I spent the next 4 days with James at the bootcamp and I was overwhelmed with James' knowledge and willingness to share great information. He held nothing back and it was clear that he wants everyone to succeed in business and in life.</p> <p>I spent the next two years in the Platinum coaching mastermind which changed my business forever. I met so many great entrepreneurs and was personally guided by James with the monthly coaching calls and the one-on-one coaching at his house.</p> <p>To top it off, I'm honored that James wrote the forward to the second edition of my Ultimate Guide to LinkedIn for Business book.</p> <p>James is an amazing coach, mentor and friend who loves changing people's lives.</p>
 Jeryl Massini-Ryan I'm the Internet Marketer's Unfair Advantage, Giving You the Freedom to Do What You Do Best. <small>August 12, 2016, Ted was a client of Jeryl's</small>	<p>I met Jeryl many years ago when she worked for Frank Kern. After communicating via email a few times we finally got to meet at a conference in San Diego. We totally hit it off and I ended up hiring her as my assistant.</p> <p>Jeryl and her no nonsense style is exactly what I needed. Her motto is When S\$%T Just Needs to Get Done and boy does she get S\$%T done. I can hand off work to Jeryl and I know it will get done the first time and I rarely have to follow up with her. She knows what needs to be done and does it saving me countless hours</p>

And it has resulted in me receiving several (35 as of now) quality recommendations that I really appreciate...



Recommendations	Ask to be recommended
<p>Received (35)</p> <p>Given (19)</p> <hr/> <p> Adèle McLay ✓Small Business Growth Expert ✓Motivational & Keynote Business Speaker ✓Author ✓Entrepreneur ✓Investor ✓Life Adventurer April 3, 2017, Adèle worked with Ted but at different companies</p>	<p>In March 2017, I hosted the LinkedIn Business Growth Bootcamp, an online learning event featuring 25 global LinkedIn experts/trainers. They each shared their knowledge by way of individual video recording in interview with me. Here is the link to the Bootcamp for your information: http://bit.ly/2m2xdvt</p> <p>I was thrilled when Ted agreed to participate as an expert in the Bootcamp. His topic was: Tapping the Power of Keywords – Making it easy for people to find you online.</p> <p>Ted's interview with me was professional, well prepared, and very insightful. I learnt so much from him that I am now looking at implementing.</p> <p>I know from the feedback we have received from our global community who registered to participate in the Bootcamp, that they gained tremendous value from our discussion and the Bootcamp as a whole.</p> <p>Thank you Ted, I am very grateful. I highly recommend Ted Prodromou to you.</p> <hr/> <p> Paul Berchtold MULTIPLY your energy, effort, and results. For the Super-Busy - Entrepreneur - Business Owner. Avoid stress & Burnout! December 15, 2016, Paul was a client of Ted's</p> <p>I found out what a nice gentleman Ted is, when I first met him on the phone. A few years earlier I had purchased and used his book "The Ultimate Guide to LinkedIn for Business" to set up my LinkedIn account. I appreciate the opportunity I had to schedule a coaching call with him to improve lead generation. During our session, Ted was very helpful answering my many questions, and giving many useful ideas. Ted has recently expanded his business' capacity by training new coaches to assist him in growing his business. Ted is devoted to his work. It's a privilege to get help from one of the best. Thank you, Ted.</p>

Step 8. Rinse and Repeat Steps Four Through Seven

Keep the process going and capitalize on the success by continuing the process. Start by:

1. Inviting your ideal LinkedIn prospects to connect using a personalized invitation message and share high-quality content related to their biggest business challenges.



2. Keep in touch with short, inquisitive messages to stay top of mind.
3. When they respond to your messages, invite them to a short phone conversation so you can learn more about their challenges and pain points. Ask them if they'd like your help.
4. After they hire you, solve their problem, give them a stellar LinkedIn recommendation, and ask them what else you can do to help them.

Now you have a proven process to use LinkedIn to generate business on demand. Spend thirty minutes a day building your professional network and building relationships on LinkedIn.



6 Lessons in Marketing:

What They Never Taught You About Growing a Digital Marketing Agency

Written by: Bob Ruffolo

Starting a digital marketing agency is easy.

Hang your shingle, define your expertise, and you're in business.

But they don't tell you about the bumps in the road, the challenges you're going to face, and how to lean in and push through them.

I know...

I run a \$4M+ agency with 42 people on staff. We've been named Partner of the Year by HubSpot. We're certified as a Great Place to Work. And we've been recognized for our company culture and the opportunities we provide women.



But it hasn't been easy.

Like every other agency, we've struggled with the day-to-day:

- Managing clients and their expectations
- Managing employees
- Dealing with stress and low margins
- Struggling to keep up with trends

So, let me tell you my story and the 6 marketing lessons I've learned along the way. Hopefully, you'll be encouraged to know you aren't alone in your struggles...

And maybe find some answers to grow your digital marketing agency, too.

The IMPACT Story

In all honesty, for the first 6 years as an agency owner, I had no idea what I was doing. I didn't know how to find good people for my team—nor how to keep them. The work we did was okay, but nothing to write home about. There were months I didn't pay myself, and my annual salary was laughable.



I started IMPACT in 2009 as a one-man show. I had been working at a manufacturing company, doing freelance website design projects on the side. But my freelance work was doing well enough, I felt it was time to leave and do my own thing.

To find work, I went to a lot of Chamber of Commerce events and literally knocked on doors of local businesses to get whatever business I could. Soon my business grew enough that I was able to hire someone to help.

Of course, we didn't have an office yet, much less office furniture. We worked out of my condo for several weeks until we got our office space. And once we got more website projects, we were able to get some office furniture. Then we hired some interns, got some more clients, and continued to grow.





The IMPACT office, circa 2012

We were your typical grass-roots, self-funded digital marketing agency. Our focus: web projects.

We realized, though, we were hearing the same complaint over and over again. "We love our website, but it's broken."

Trying to understand the problem, I asked clients to explain.

"We thought we'd get more business from the website," they told me.

Clearly, I needed to help them get better results, so I started researching ways to make websites work better.



That's when I found myself on [HubSpot's blog](#). Soon, I was on the phone with them, listening as they told me what it would be like to be a HubSpot partner.

They had me at: "Listen, you're a \$300,000 company now. We know how to get you to a million dollars."

I asked where I should sign. Then I told my team, "We're going to be an inbound marketing agency now."

"What's inbound marketing?" they asked.

I answered, "I don't know, but we'll figure it out together."

The HubSpot Partner Program

Revamping our agency took work. We'd work all day then stay up all night watching videos and webinars. Our goal? To learn what inbound marketing was, how to use HubSpot, and how to sell it.

We're very visual people, so as we figured things out, we laid it out in a graphic. But remember, we were new to inbound marketing, so we weren't sure it was right. We sent it to HubSpot for feedback.

Not only were we right, they told us that [if we turned it into an infographic, they'd publish it on their blog](#).



So, we did.



That was the moment when everything changed.



It was the perfect storm: Pinterest had just come out and was really popular. HubSpot and Inbound were really popular. Infographics were a new medium that everyone loved.

This one infographic generated:

- 10,000+ social shares
- 192% increase in website traffic in just 2 months
- 5 new retainer clients doing inbound marketing

This put us into the top tier of the HubSpot Partnership Program. I was named the Rookie of the Year. We were taking off, and I staffed up again.

Now we were a team of 23 people, and almost overnight, we got to about \$2M in revenue. I was asked to present to the agencies at Inbound '13 on how agencies can position themselves for larger retainers and growth.

I thought I had it all figured out.

But I didn't.

I was making a lot of mistakes.



People Problems & Hitting Rock Bottom

My biggest problem was not knowing how to handle bad employees.

For example, I had a salesperson who had been underperforming for some time. We weren't getting along, and it just wasn't working out. I knew I should have fired him long ago, but I hadn't done it yet.

Big mistake.

It came to a head at Inbound, where I was making my presentation. There, in front of our team and the other attendees, this employee and I got into an altercation.

It was embarrassing. It was bad for morale. And I still didn't fire him!

Bigger mistake.

It started a subculture of negativity in the company, which went on way too long. When I finally did fire him, I had to let a whole group of people go with him.

Unfortunately, it took my team by surprise, and since it happened so quickly, the negativity continued. The people I let go were still bad-mouthing us, and those who stayed with me didn't know what to think.



Worse still, they didn't trust me.

And that's just one example. Over the next few years, we made more bad hiring decisions. We had to let more people go. And there was a \$2M ceiling we just couldn't break through.

Then, in the summer of 2015, we hit rock bottom.

At this point, not only did we have a lot of employee turnover, we had client turnover that translated into a loss of \$27,000 a month.

That summer, we lost 21 employees, leaving us with a team of 23 people. We also lost 19 clients, more than half of our average retainer. The financial impact was \$2M of lost revenue and missed opportunity.

So, what did we do?

We Cleaned House

We started by getting the wrong people off the bus.

Any employee who was underperforming or wasn't a good fit was let go. But this time, we did it better. Everyone who went knew why it was happening and what they'd done wrong. We also helped them find new jobs by helping them update their resumes and giving them references.



Then we got the right people on the bus.

We added people to the team who knew their job better than I did. They were professional, easy to work with, and cared about the work they did.

We documented our vision.

After getting our team right, this was the most important thing we did: We created a written document of our vision and goals, and what the company was going to look like in a few years.

I then presented that to the company, getting their input and buy-in. This helped everyone see what we were working towards and how they fit into the big picture.

Next, we rebuilt our leadership team and brought in the right advisors.

We brought in Jack Carroll as a sales consultant. Not only did he help us refine our presentation and close more deals, he helped us set client expectations and communicate with them more clearly.

He also helped us identify an internal problem: stress, which led to complaining, which was a symptom of a bigger problem—lack of business maturity.



We implemented 1-on-1s to help manage internal stress, which gave the entire team the capacity and maturity to do their best work.

I worked on myself, too.

I invested in a 360° survey so I could understand what people really thought about me and my leadership style. It's painful to realize that the way you think you're presenting yourself isn't how you're being received. But it gave me valuable insight.

I was able to identify the issues that were making my team unhappy and let them know I was working on them. That was one of the most important things I could have done to earn the trust of my team.

Finally, we focused on improvement.

Instead of focusing on the size of our agency or how quickly we were growing, we focused on being the best. This was all about improving the quality of what we do.

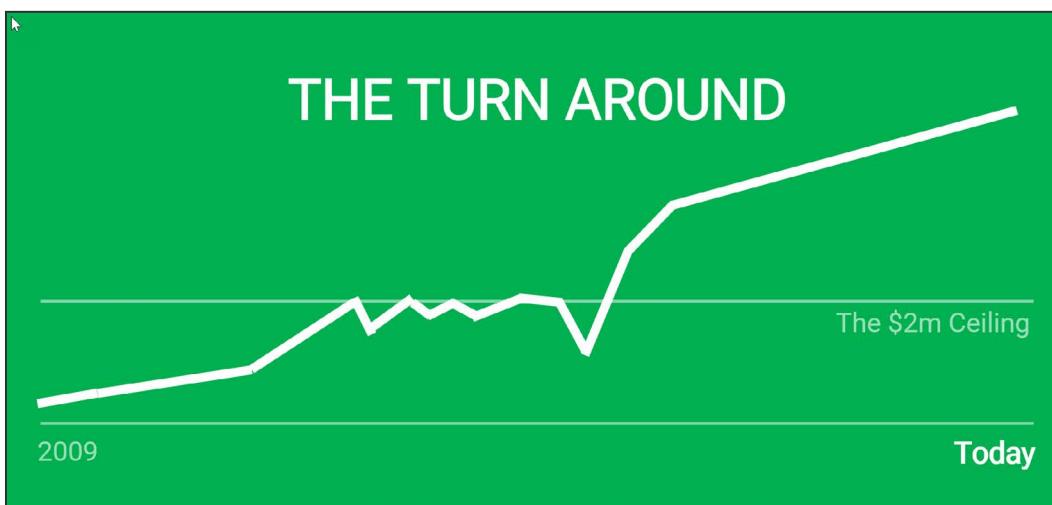
And it worked.

The year following our housecleaning, no one quit the company, no one retired, and we grew—without having to add to the team.



The Turn-Around

The 4th quarter of 2015 was the best quarter we'd ever had. The 1st quarter of 2016 was even better. And since then, it's been all growth.



Growth Tip: having the right people on your team is jet fuel for your agency's growth.

We also started IMPACT Live, which had 200+ attendees and top-level speakers, including Mike Molpe, David Meerman Scott, Mark Roberge, Tara Robertson, and Marcus Sheridan. (The [DigitalMarketer](#) team was a huge help in making that happen.)



A Few Things We Got Right

As you've seen, we made a lot of mistakes along our journey. Fortunately, though, not everything we did was a mistake. There were a few things we got right.

Our First Hires

Our first hire was Tom DiScipio. He's still with us and is probably one of the most important people in the company.

People always ask me who their first hire should be. They want to know what qualities they should be looking for. I think of Tom as the perfect example.

He had a few years of experience, so he came in with business maturity. He was still young, so he was affordable. He had leadership potential, and I knew from talking to him that he could eventually lead an entire department.

When you're ready to hire, **look for someone who has enough experience they can hit the ground running.** And make sure they can help you manage your clients on a day-to-day basis.

Our second hire, Natalie Davis, was also a good decision. She started out as our receptionist, then did our social



media for us. And when we became an inbound agency, she was our first Inbound Marketing Consultant.

But where she really shines is this: she's the voice of our employees. Natalie has high trust with everyone on the team, and when they have a problem, they talk to her. She's then able to bring those problems to me and help me figure out how we can create a better work environment and make this the best place to work.

That's her passion. She's the reason we've been recognized as the Best Place to Work and the Best Place for Women.

She's also the reason we have such a great remote culture. Thanks to her, our 15 remote employees feel like they're an integral part of the company and don't feel isolated.

A Strong Investment in Our Own Marketing

You've heard that the cobbler's kids have no shoes. Well, that's not the case for our agency. Our kids have Air Jordans.

We don't just do marketing for our clients. We're heavily invested in marketing ourselves.

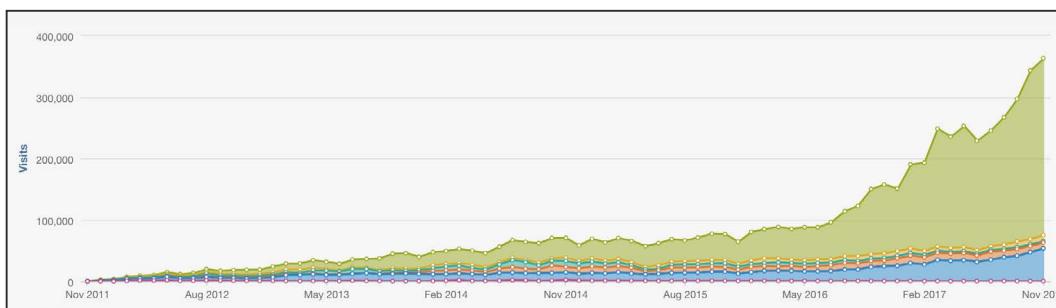
Even when our team was small, we had 1 full-time person dedicated to marketing. When we hit 15 employees, we



had 2 full-time marketers. This year, we plan to add even more people to the marketing team.

Even at our low point in the summer of 2015, we had 5–10 consultation requests asking about our services each week.

At that point, we had about 75,000 monthly visitors to our site. Today we have 360,000+ monthly visitors, with 6,000 new monthly subscribers.



Our growth journey to 360,000+ monthly visitors and 6,000+ new monthly subscribers. (Green = organic traffic)

The 6 Biggest Marketing Lessons Learned

Your story may be similar to ours. Or your problems may be vastly different. But the lessons we learned should apply to everyone.

These are the lessons in marking we're never taught about growing a digital marketing agency.



Marketing Lesson #1: Your People Are Your Product

Your staff are the touchpoints for your clients. They're the ones your clients are talking to, asking questions of, and getting answers from. Your staff are your product.

In our agency, our clients are smart. They're VPs and directors who know a lot about marketing and where the world is going. They hire us because they want someone to brainstorm with, to keep them up-to-date on what other brands are doing, and to feed them really good ideas.

They want to work with a peer, not an entry-level worker. So, we have to hire the best people we can find.

My recommendations:

- **Choose your team members wisely.** Be sure they can do the job and be highly effective. Your goal is to onboard them and put them in front of your clients within 30 days of hiring them.
- **Hire for skill and culture.** They need to align with your values and have a shared purpose, but they need to have the skills to do their job well.
- **1-on-1s are critical.** We have 30-minute 1-on-1s every 2 weeks. What are the problems they're struggling with? What do they know that we don't



know? How are we coaching them to get them to the next level? That's the focus during this time.

- **Get good at firing.** That sounds cruel, but it's not. When people are underperforming or aren't a good fit, they're holding your company back and the rest of the team. You have a responsibility to put those underperformers in a role where they can succeed. If that's outside your company, it's important to help them make a smooth transition.

Marketing Lesson #2: Document Your Vision

Your people need to see their future at your agency.

I'm assuming you know what your agency will look like in 3 years. Most of us do. But if you asked your employees, would they know? Or would they say something different than you?

As a leader, it's important to let your team know where you're headed and how they fit into your vision. We've learned the hard way: [when people don't see how they fit in your future, they don't stay.]

Recommendations:

- **Create a 3-year vision.** This is long enough to get something done but not too long.



- **Make it exciting.**
- **Ask for input and commitment from the team.**
- **Keep it alive.** All objectives need to help you reach that vision, and you need to measure your progress.

Marketing Lesson #3: Manage Through Objectives

Objectives are the goals you set to help you reach your 3-year vision. But you shouldn't set random objectives. To know what they should be, work backwards from your 3-year plan.

So, let's say that, based on IMPACT's 3-year plan, we have 5 high-level objectives that the entire company is structured around.

Example: IMPACT Objectives

1. **Best Place to Work** ([Natalie, Talent/Admin](#))
2. **Be the Best Agency** ([Brie, Client Services](#))
3. **Continued Sustainable Growth** ([Tom, Sales](#))
4. **Expand the Brand** ([Kathleen, Marketing](#))
5. **IMPACT Live '18 a Success** ([Chris, Operations](#))

To manage these objectives, we use the [Entrepreneurial Operating System](#) (EOS), assigning a leadership team to each objective to make sure we continue to improve in that area.



We assign a department head to each of them, then we build our teams around that.

Now let's go down another level.

Here, we set OKRs ([objectives and key results](#)) for each objective, which we update every quarter.

Example: IMPACT's Quarterly Objectives w/ Key Results:

Be the Best Agency:

1. Document and launch improved client onboarding process
2. < 2 cancellations for not meeting client expectations
3. Collect NPS score from all clients 2x / mo.
4. Average NPS > 9
5. Hire 2 Strategists

This is a really simple process. Each department head is responsible for one objective, and they have their own key results to work on. The key results are then re-set each quarter based on what they need to work on.

We've been managing the business this way for 3 years, and this is how we get traction. We put these objectives in place, structure the leadership teams, and everyone rallies around them to make sure we reached our goals.



Marketing Lesson #4: Listen to Your People & Take Action

Brian Halligan says, "Feedback is the breakfast of champions."

At our company, we do a team survey once a quarter. Similar to an NPS Survey, it asks employees:

- How happy they are with their employment at IMPACT
- What things about our culture they find hypocritical
- What our weakest link is right now

We ask a lot of tough questions in the survey because we want to extract all the things that are bothering our people.

Like the 360° Survey I did when I was working on myself, the truth sometimes hurts. But we can only fix problems if we know they exist.



QUESTIONS RESPONSES 20

Team Survey (August '17)

Please fill out the following questions. Answers are anonymous.

Please select your team/department. *

1. Jr. Consultants, Consultants, Strategists
2. Designers and Developers (Client Services), Project Managers
3. Smarketing Team, Ops/Talent Team, Other Non-Pod Roles.

How happy are you with your employment at IMPACT? *

1 2 3 4 5 6 7 8 9 10

Not happy at all. Completely content.

Once a quarter we do a Team Survey to gauge employee satisfaction.

When we fix these types of problems, that sends a strong message to our team that we care, and that's important for building a positive culture.

Once you get the feedback, though, you have to take action on it. Tell your team:

- These are the things we heard from you.
- These are the things we're going to work on now.
- These are the things we're going to put on the back burner, and we'll get to them later.



Marketing Lesson #5: Don't be Afraid to Ask for Help

We can (and should) be a community that works together to help one another. I can't tell you how many times I've called someone to ask what my next steps should be, how they did something at their agency, or what's working for them.

You need to be learning constantly.

This is what I'm learning right now...

We're entering a new level of IMPACT with a new 3-year vision, so I'm talking to Ann Handley and Joe Pulizzi to understand how they grew MarketingProfs and Content Marketing Institute. I'm talking to Ryan Deiss about how he did things with DigitalMarketer.

You're learning things too, and we can help one another. So, ask for help, but remember to pay it forward and help the people who come to you with questions. If you learn something, share it.

Marketing Lesson #6: Enjoy the Ride

Entrepreneurship is tough. Growing a digital marketing agency is one of the biggest challenges you can face.



But it's also rewarding. Not everyone has the opportunity to do what we're doing. So, I want to leave you with one last piece of advice...

Along the journey, stop, take a deep breath, and enjoy it.

Growing your agency is a lot like a video game. Every time you progress to a new level, it gets hard. You find yourself struggling to figure things out, and you feel like you'll never beat it.

But you do end up beating it. And when you do, you progress to the next level, where it only gets harder.

That's how the game goes.

Accept the challenge and enjoy the ride.



WHAT'S NEXT?

Now that you've got the tools and resources you need to generate more valuable relationships and revenue, you're ready to [take your agency to the next level!](#)

If you're ready to get more clients, improve client retention, and generate more passive income from the clients you already have, DigitalMarketer is here to help with our [Certified Partner Program](#).

We want to double the size of your business so you can do the same for your clients.



What can our Certified Partner Program do for you?



So, if you're serving small businesses, then we want to serve you. Let's start a conversation today about becoming a [DigitalMarketer Certified Partner](#) and get the tools and training you need to double your client's business and your own.

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