Sales Playbook

Your one stop shop for everything sales related at PrezLab

PREZLAB
Digital Design Firm

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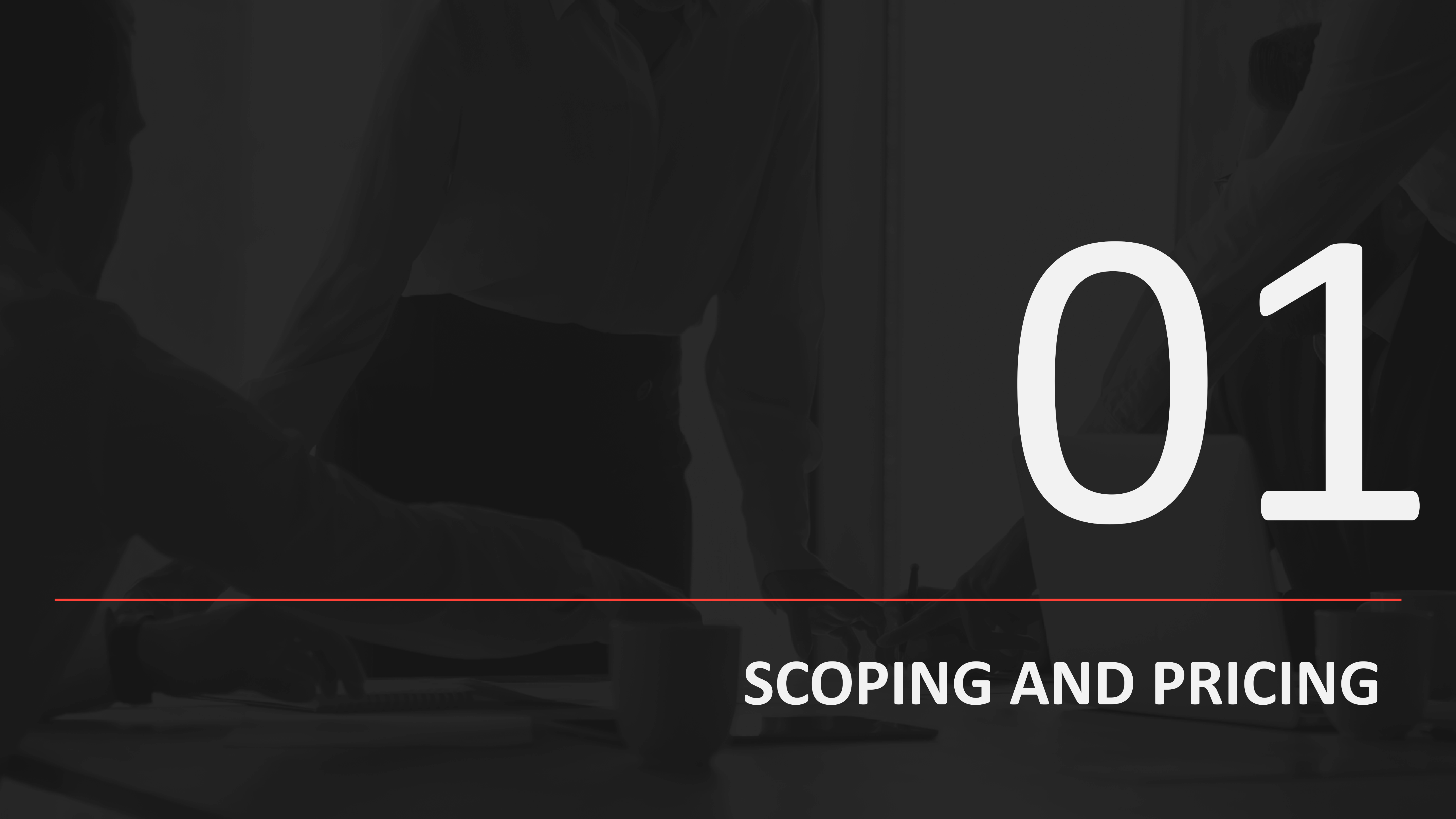


01

SCOPING AND PRICING

WHAT IS THE PURPOSE OF THIS SECTION?

- This section is meant to help you understand how we normally price our different services, and some of the reasoning behind it.
- This section will ultimately help you manage conversations around pricing with clients, to help them understand the spectrum of services and levels of design we offer, and to help them pick what's right for them. It is very important to be able to draw this "spectrum" to help justify our pricing
- This section will help you gain more confidence when shooting out a quotation or proposal, knowing that you have given the client the right option/s to based on their specific requirement

GENERAL PRICING METHODOLOGY

The default mode of pricing at PrezLab is the hourly pricing model. Having said that, it is not necessarily that we ultimately price based on an exact or accurate estimation of how much time a job will actually take.

The reason for this is that we cannot allow our own efficiency to punish our profitability. Imagine if one of our designers achieved a level of mastery that allows them to push out 6 slides an hour when the average is 3 slides an hour. Does that mean we should lower our price in that specific case? The answer is no.

Therefore, the hourly pricing model provides a methodology of pricing that is flexible and can adapt to different clients and budget/ quality expectations. It also allows us to price additional requirements like project management time.

Our hourly pricing can range between 220 AED – 350 AED based on who you are talking to. Generally, 350 AED hourly pricing is reasonable when we are being compared to Dubai based agencies, however it might be perceived as outrageous if we are being compared to Indian agencies.

It is also important to explain to clients that pricing will ultimately depend on their “quality expectations”. For example, we have sold 15 slides at 2,000 AED and we have also sold them at 20,000 AED. The biggest determinant is the client’s quality expectations.

Finally, there is often no reason to explain our pricing methodology for Ad-Hoc accounts, unless we are asked to. Ad-Hoc projects can usually be detailed in a quotation against a certain quantity of deliverables without explaining how the pricing happened.

A

PRICING PRESENTATIONS

LEVELS OF PRESENTATION DESIGN

We have 5 primary “layers” of presentation design:

- **Flipping**
- **Formatting**
- **Enhancement** (consists of two sub-levels, but this is not revealed externally to clients to avoid complexity. Our clients often call this a “mix of enhancement and amplified” which can be considered accurate)
  - Enhancement level 1 (basic)
  - Enhancement level 2 (more visual, incorporates images, illustrations, infographics, etc.)
- **Amplified**
- **Immersive**
- **Concept Creation:** Creating a unique theme for the presentation. This can be excluded when there are clear templates and guidelines to follow

Learn more here (Internal Document)

Learn more here (External showcase)

WORDS OF ADVICE

Although we have managed to categorize or “package” our PPT services quite well, it is important to remember that design is a very gray area, and it is impossible to completely standardize our services.

These layers provide an easy way of helping our clients understand that the service is very flexible and adapts to different budgets, turnaround times, quality expectations, etc.

It is also important to understand that there are some points that may increase OR decrease the average amount of time spent on designing slides. This is normally a point that clients may challenge you on. For example:

- If we are reusing one slide “template” to input different content in a repetitive manner, this usually means we are achieving a faster productivity benchmark
- If the slides have images or hand-drawn sketches, where the text needs to be retyped, this often means we will spend more time on the slide
- If the slide is extremely condensed with content, this means we will have to spend additional time on content Quality assurance (making sure we haven’t changed, edited, removed, or added to the source content file
- A high number of slides (30 +) might be a cause for decreasing the price per slide slightly, since the repetitiveness allows us to get faster as we go

WORDS OF ADVICE

Also keep in mind that there are different types of presentations for different purposes. It is important to be able to write a clear brief for our creative team. Below you can find the briefing template for presentations.

All the below are important questions to be able to recommend, scope, and brief properly:

- Objective of the presentation
- Audiences
- Shelf life (how long will they use it?)
- What is the tone of the presentation? (corporate, fun, futuristic, etc.)
- How often will the presenter need to edit it, and what type of editability will they need to apply?
- What is the latest deadline for delivering the presentation?

Briefing forms here

PRESENTATION DESIGN PRICING

Service	Pricing Time (hours)	Competitive (220 AED)	Mid (285 AED)	Ambitious (350 AED)
Concept (enhancement level)	8	1,760	2,000	2,800
Concept (amplified level)	16	3,520	4,000	5,600
Concept (immersive level)	24	5,280	6,000	8,400
Flipping	0.1	22	25	35
Formatting	0.1	22	25	35
Enhancement level 1	0.4	88	100	140
Enhancement level 2	0.6	132	150	210
Amplified	1	220	250	350
Immersive	3	660	750	1,050

PRICING PPT TEMPLATES

The price of a template can vary greatly based on how many slides, and what types of slides they want to incorporate inside the template. A basic rule of thumb for you to price can be as shown below:

- Concept Creation: 24 hours
- Time per slide: 1 hour
- Flipping to Arabic: 8 hours
- Configuration to become a template: 8 hours
- Average price for a 15-slide template: 17,500 AED based on mid-range hourly price

General considerations:

- Templates can have more than 1 option per slide, for example covers and separators are usually given two options
- Make sure to build your template scope based on the client’s specific requirements
- Try not to sell a template that has all the options in the world, because this decreases our chances of selling our services to the client in the future

B

PRICING VIDEOS

TYPES OF DIFFERENT VIDEOS

There are many types of different videos, but for the sake of pricing, you can consider that there are only two types:

- 2d animation videos
- Live footage videos (stock footage or filmed)
- Many examples here

There are several factors you want to keep in mind when pricing for videos:

- The level of customization when it comes to illustration. Are we using existing illustrations from a library, or are we customizing them, or are we drawing them from scratch?
- The level of detail when it comes to illustration. Do they have shadows? How detailed are their facial expressions and features?
- What level of motion graphics are we applying? Is it basic, or very smooth and high-level?
- How many stock footage videos are we buying, if any?
- Are we adding a voiceover? Is their dialect local (more expensive) or international (less expensive)?
- What is the length of the video?
- Are we preparing the script/ content approach or is the client?

Type & example	Script	Concept	Storyboard	Voiceover	Customized characters scenes	Turnaround Time	Rate per minute with VO (neutral accent)
PowerPoint video	Optional	Optional (1 to 2 slides)	Not included	Optional	Not included	3 to 5 working days	7,000 to 9,000/ minute
Infographic Video	Optional	Optional (intro and1 scene)	Optional	Optional	Not included	4 to 6 working days	12,000 till 16,000/minute
Footage and infographics	Optional	Optional (intro and1 scene)	Not included	Optional	Not included	4 to 6 working days	10,000 till 15,000
2d animation video	Included	Included	Included	Optional	Included	2 to 4 weeks	17,000 till 19,000 per minute
Complex 2d animation video	Included	Included	Included	Optional	Included	5 to 8 weeks	28,000 + depending on complexity

Typical video cycle

Video creation

Evaluating content/developing script

- *Do we have material that we can extract content from*
- *Will they provide an initial script or ideas*
- *Do we have to gather content from team members or via meetings?*
- *Do we have to handle everything from A to Z?*

Concept creation (if applicable)

Would sharing previous samples of our work suffice?
What level did they ask for?
Do we have time to create a concept?
Is it needed to the level of video selected?

Full storyboard development

Did they select a video level that requires storyboard?

VO recording background music

Do we have an approved script, dialect preference

What is the suitable background music for this video?

Animation Adding subtitles

Level of animation required
Did they approve script, storyboard and VO talent and background music?

Video Scope/requirements gathering

Items to clarify and lockdown before project initiation

- Project objective, and which video level they are requesting
- Where the video will be played, any specific size required? If not we will proceed with standard HD size (1920 x 1080)
- Do they require any content support, or will they provide the video script
- Languages requires for the video , (English, Arabic, etc)
- The preferred duration of the video
- Do they require voiceover, if yes any specific accent (American/British, Emirati/Saudi)
- Do they require subtitles for the video
- Point of contact, that will be responsible for approving each phase of the design

Video – Content evaluation

Content evaualtion

We start with evaluating the document received from the client, we always recommend minimalcontent for a better end result and visualization

What is considered suitable text for a video

- Up to 15 words per slide/ frame
- Clear, concise, straight to the point content

Steps to take if text exceeds the recommended word limit

- Explain to the client that the content needs further summarization/will be mostly text based
- If not accepted then this will translate in an increase in the video duration, more text filled frames/scenes

Video-Concept creation

We will occasionally receive requests for a video sample or concept before or after project the project is officially approved

Depending on the importance and scale of the scale of the project, we usually either share our previous samples or customize a concept for the project

PowerPoint/infographic and real footage videos concept:

- Animated cover and 1 to 2 inner slides

2D/3D Video concept:

- We can select a part of the content/script that would be simple to visualize and the designers are confident about, and create a 2 page storyboard for the client to view

Video Script

Script creation

If we are required to develop the script, then this will require a base/foundation of content from the client or we can collect data via meeting/calls to hand over to content/script writer, if this entails voiceover recording, then we have to separate the content into

1.Content that the voiceover artist will record
2.Content that will be presented on the scenes/frames that won't be recorded (for example main video title)

if the clients provides script, we have to confirm the following:

•that it is final and approved, if not we can offer our content services (copywriting or proofreading)
•Do they require the video in any second language, if yes, we can offer help with translation

Video Voiceover

Phase 01: searching and selecting the suitable voiceover artist based on the client's preference, the voiceover search criteria:

- Gender of the artist (Male/Female)
- Dialect of the voiceover artist (American, British, Emirati, Saudi)
- Age of the voiceover artist (Teen, adult, etc)
- Language of recording

Phase 02: Sharing VO samples with the client and getting approval
Share the filtered results with the client, to review and confirm

Phase 03 Recording the voiceover
We only proceed with recording the VO once the client approves script and selects the voiceover artist

Voiceover useful info

A typical 1-minute voiceover should be around:

- 100 to 140 words
- This depends on the speed and pace required, for example, the mohapback to work video is 120 words per minute
- Some artists have a slower pace while reordering thus, we should always aim for an average of **120 words per minute**

bonus info:

This could help the business development team and operations estimate how long a video would be, try recording your self while reading the content for a better estimation

Video Storyboard

Storyboard creation
A storyboard consists of illustrations or images displayed in sequence for the purpose of pre-visualising a motion picture

When do we start the full storyboard creation?

Once the **script and concept(if applicable) is approved from** the client

Why do we create storyboard?
- To lock in the design of each scene and design elements before moving into animation
- Editing a video is a time consuming process, thus approving the full storyboard is crucial

Who creates/designs the storyboard:
- Our internal design team are capable of designing a full storyboard

Video-Background music

Confirming background music in parallel with the script/voiceover is beneficial to have everything aligned for the next steps

While selecting background music, take intro consideration the following points:

- Where will it be presented ? For example, an instructional video that will be posted on YouTube will have different music that a campaign launch video posted on Instagram
- Purpose of the video? is it more on the corporate/governmental side or more if a friendly, approachable video
- Using keywords to search for background music is useful, look for keywords that are aligned with the objective and purpose of the video (instructional, tutorial,etc)

Video Animation

Following storyboard, voiceover and background music approval, we start the animation process
Why is this step is at the end of the video creation process:

- To lock in the design of each scene and design elements before moving into animation
- Editing a video is time consuming process, thus approving the full storyboard is crucial

Who animates the video

- Our team is capable of managing the PowerPoint videos from A to Z
- External/third party resources might be needed for 2D/3D animation, based on the scope complexity (Umer, others)

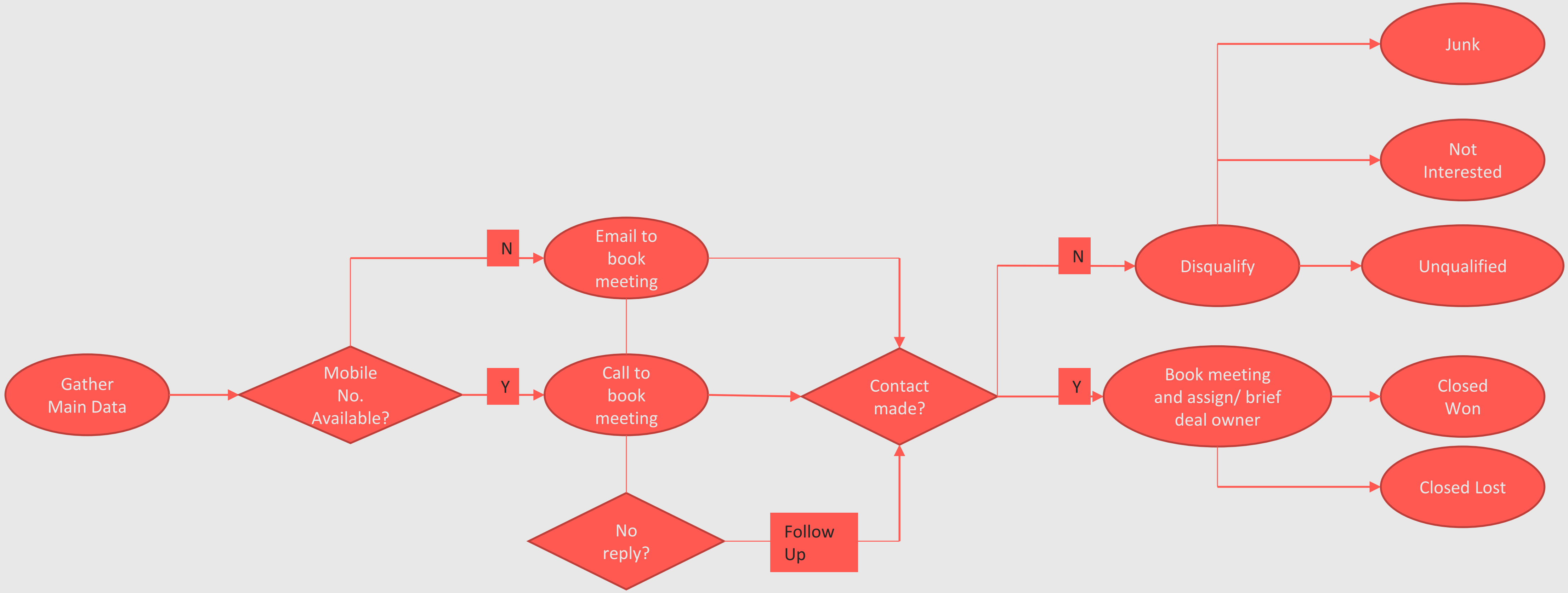
02

INBOUND

A

WORKFLOW

INBOUND WORKFLOW



B

SERVICE PLAYBOOKS

GENERAL TIPS FOR INBOUND LEAD CALLING

- Smile! Sound friendly and professional
- Don’t ask the person if they have time, or if you can ask them some questions. Jump straight into your opener and questions
- Try to keep the call length around 5 minutes to build enough rapport, but not bore the person on the phone
- Ask your qualification questions and then ALWAYS go for the meeting. The deal owner will decide if the lead is qualified or not (for now)
- Make sure it doesn’t sound like you’re reading from a script. Practice the script out loud a few times until it feels natural and conversational
- Try to call in the early morning or late afternoon, when people are usually free to talk. You can schedule your calls between 9:30 AM – 11:00 AM and 3:00 PM – 5:00 PM
- Listen ACTIVELY! That means asking follow-up questions, mirroring what the other person says, and paraphrasing their points to make them feel understood. Get them to think “Exactly… that’s what I want”.

OBJECTIONS AND ANSWERS

- Send me a quote/ proposal please
  - I’m happy to send you a quote, no problem. But we first need to evaluate your request in more detail, to make sure our price fits your budget and needs. When would you have 15 – 30 minutes for a quick call?
- That price range is too high for me
  - No worries. Would it be a terrible idea to meet with our Head of account growth just to assess further? Perhaps we can find a way to meet your budge

CLIENTS WE HAVE WORKED FOR

- What clients have you worked for?
  - Start-Ups/ Technology:
    - Careem
    - LinkedIn
    - TikTok
  - Government:
    - Saudi Tourism Authority
    - UAE Prime Minister’s Office
  - Consulting Firms:
    - McKinsey
    - Boston Consulting Group (BCG)

PRESENTATION DESIGN

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request. As you might know PrezLab specializes in presentation design and we have designed presentations for all types of clients ranging from like Start-Ups, consulting firms, and government entities. {mention relevant client names if relevant}

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What is the purpose of your presentation/s?
- What audiences do you usually present to?
- Will you be presenting online or physically?
- Do you have a certain budget range in mind?
- I would like to schedule a call for you with our Head of Account Growth who can advise you on the best approach for your presentation and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the content) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
  - “We have flexible pricing based on the level of design required and the content required. Our Head of Account Growth can guide you through the different options”
- *If they insist on getting a price range*
  - “We price per slide and it could range anywhere from 70 – 500 AED. It all depends on the level of design and animation we go for. We also charge a small fee to create a unique design concept for your presentation”
- How does the process go?
  - “Well after you approve the quote, our team might ask you some questions to understand if you have some design preferences or brand guidelines to follow. We then need 2 – 3 days to prepare two design concepts for you to choose from. They are basically a few slides to show our direction in terms of color, design, layouts, etc. After we get your approval and feedback on one of the concepts, we design the 1st draft, where you will get two rounds of iteration and feedback for any needed changes. After that we finalize the presentation and send it to you”

BOOKS & REPORTS

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request. As you might know PrezLab has designed many books and reports for various businesses including government entities, tech companies, and consulting firms {mention any names that might be relevant}

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What is the purpose of your report?
- What audiences are going to view the report?
- Do you have certain preferences in terms of design? For example, would prefer a minimal approach with a focus on text and images? Or perhaps we can add illustrations, infographics, etc.?
- Do you have a certain budget range in mind?
- I would like to schedule a call for you with our Head of Account Growth who can advise you on the best approach for your report and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the content) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
  - “We have flexible pricing based on the level of design required and the content required. Our Head of Account Growth can guide you through the different options”
- *If they insist on getting a price range*
  - “Our price per page could range anywhere between 300 – 700 AED. It all depends on the level of design and animation we go for. We also charge a small fee to create a unique design concept for your report”
- How does the process go?
  - “Well after you approve the quote, our team might ask you some questions to understand if you have some design preferences or brand guidelines to follow. We then need 2 – 3 days to prepare two design concepts for you to choose from. They are basically a cover page, table of content, and a few inner pages to show our direction in terms of color, design, layouts, etc. After we get your approval and feedback on one of the concepts, we design the 1st draft, where you will get two rounds of iteration and feedback for any needed changes. After that we finalize the report and send it to you”

VIDEOS

CALL OPENER

"Hi {lead's name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

"{Lead's name}, I'm calling to introduce PrezLab and ask you a few questions regarding your request. As you might know PrezLab has designed many videos for government entities, StartUps, event reveals and launches. We can also produce a variety of videos like 2d character explainer videos, infographic videos, photorealistic videos, etc.

"So, I'd like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What is the purpose of your video?
- What audiences are going to view the video?
- Do you have certain preferences in terms of design? For example, would prefer a 2d explainer, infographics, both, etc?
- Do you have a certain budget range in mind?
- I would like to schedule a call for you with our Head of Account Growth who can advise you on the best approach for your report and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the content) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
    - “We have flexible pricing based on the level of design required and the content required. Our Head of Account Growth can guide you through the different options”
- *If they insist on getting a price range*
    - “Our price per minute could range anywhere between 10,000 – 40,000 AED. It all depends on the level of design and animation we go for. We also charge a small fee to create a unique design concept for your report”
- How does the process go?
    - “Well after you approve the quote, our team might ask you some questions to understand if you have some design preferences or brand guidelines to follow. We then need a couple of days to finalize the script (if it’s not ready from your side). After that it takes around 5 – 10 working days to finalize the storyboard, which is basically the scenes of the video. After you approve the storyboard, it takes a few days to animate the video and produce the 1st draft. Finally, we get your feedback, add the voiceover, and finalize the video”

IV

INFOGRAPHICS

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request. As you might know PrezLab has designed many infographics for government entities, StartUps, event reveals and launches. We can produce infographics in static or animated format based on the goal and audience.

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What is the purpose of your infographic?
- What audiences are going to view the infographic?
- Do you have certain preferences in terms of design? For example, would prefer a illustrations, infographics, etc.
- Do you have a certain budget range in mind?
- I would like to schedule a call for you with our Head of Account Growth who can advise you on the best approach for your report and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the content) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
  - “We have flexible pricing based on the level of design required and the content required. Our Head of Account Growth can guide you through the different options”
- *If they insist on getting a price range*
  - “Our price per page could range anywhere between 5,000 – 20,000 AED. It all depends on the level of design and animation we go for.
- How does the process go?
  - “Well after you approve the quote, our team might ask you some questions to understand if you have some design preferences or brand guidelines to follow. We then need a couple of days to finalize the script (if it’s not ready from your side). After that it takes around 5 – 10 working days to finalize the storyboard, which is basically the scenes of the video. After you approve the storyboard, it takes a few days to animate the video and produce the 1st draft. Finally, we get your feedback, add the voiceover, and finalize the video”

V

PRESENTATION DESIGN

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request. As you might know PrezLab specializes in presentation design and we have designed presentations for all types of clients ranging from like Start-Ups, consulting firms, and government entities. {mention relevant client names if relevant}

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What is the purpose of your presentation/s?
- What audiences do you usually present to?
- Will you be presenting online or physically?
- Do you have a certain budget range in mind?
- I would like to schedule a call for you with our Head of Account Growth who can advise you on the best approach for your presentation and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the content) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
  - “We have flexible pricing based on the level of design required and the content required. Our Head of Account Growth can guide you through the different options”
- *If they insist on getting a price range*
  - “We price per slide and it could range anywhere from 70 – 500 AED. It all depends on the level of design and animation we go for. We also charge a small fee to create a unique design concept for your presentation”
- How does the process go?
  - “Well after you approve the quote, our team might ask you some questions to understand if you have some design preferences or brand guidelines to follow. We then need 2 – 3 days to prepare two design concepts for you to choose from. They are basically a few slides to show our direction in terms of color, design, layouts, etc. After we get your approval and feedback on one of the concepts, we design the 1st draft, where you will get two rounds of iteration and feedback for any needed changes. After that we finalize the presentation and send it to you”

ANSWERS

- What clients have you worked for?
    - Start-Ups/ Technology:
        - Careem
        - LinkedIn
        - TikTok
    - Government:
        - Saudi Tourism Authority
        - UAE Prime Minister’s Office
    - Consulting Firms:
        - McKinsey
        - Boston Consulting Group (BCG)

VI

SOCIAL MEDIA

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request. As you might know PrezLab specializes in information and digital design solutions, including social media design & management. We have designed and managed social media channel for all types of clients ranging from like Start-Ups, consulting firms, and government entities. {mention relevant client names if relevant}

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What are your current business goals ?
- Who is your target audience ?
- What is your current state on social media ? (Do you have your sociall media channels set up ?)
- What kind of content are you planning to market on social media ? (Static posts, GIF's, Animated)
- On what social media channels are you planning on marketing your posts ?
- Do you require social management services too ? (Analytics, Marketing, Paid Ads ?)
- Would you be interested in knowing more about our retainer packages ?
- I would like to schedule a call for you with our Head of Digital Services who can advise you on the best approach for your Social media requirements and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the content) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
    - “We have flexible pricing based on the type of social media posts required, number of social media posts required on weekly/monthly basis, and whether or not you’re interested in management & analytics. Our Head of Digital services can guide you through the different options”
- *If they insist on getting a price range*
    - “For a single post it could range anywhere from 300 – 700 AED. It all depends on the type of post, level of design and animation, and whether you require our content and translation services. Of course Going with a monthly retainer would result in a lower rate per post
- How does the process go?
    - “Well after you approve the quote, our team might ask you some questions to understand if you have some design preferences or brand guidelines to follow. We then need 2 – 3 days to prepare the creative theme for your campaign. After we get your approval and feedback on the theme, we set the calendar and start the design phase.

ANSWERS

- What clients have you worked for?
  - Start-Ups/ Technology:
    - Careem
    - LinkedIn
    - TikTok
  - Government:
    - Saudi Tourism Authority
    - UAE Prime Minister’s Office
    - Ministry of Health & Prevention
    - Etihad Credit Insurance
    - Emirates Diplomatic Academy

VII

BRANDING

CALL OPENER

"Hi {lead's name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

"{Lead's name}, I'm calling to introduce PrezLab and ask you a few questions regarding your request.

As you might know PrezLab specializes in digital design solutions, including branding & visual identity, as well as web design & development.

We have supported a number Start-Ups, and government entities in optimizing and uplifting their brand, to ensure consistency across their communication channels. Our services also include logo design and brand guidelines. {mention relevant client names if relevant}

"So, I'd like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- Do you currently have a brand identity or a logo ?
- What kind of deliverables are you looking for in your branding project ? (Logo Design, Brand Identity, Brand Guidelines)
- What does your business / product do?
- Who is your target audience ?
- Who would you say are your 3 main competitors (direct or indirect)
- Can you share with us your current brand guidelines, website, social media channels ?
- I would like to schedule a call for you with our Head of Digital Services who can advise you on the best approach for your branding requirements and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the brand guideline) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
  - “It really depends on the set of deliverables required. Our Head of Digital services can guide you through the different options”
- *If they insist on getting a price range*
  - We provide Mini branding with limited set of deliverables, all the way up to the full exercise including brand guidelines, communication and narrative strategy with additional customized services. **Branding requests will need be evaluated by our brand strategist & head of digital services.**
- How does the process go?
  - “A meeting with our brand strategist will be required to set the process based on the set of deliverables and what is required.

  Our Head of Digital Services who can advise you on the best approach for your branding requirements and discuss pricing. Would {specific date & time} work for you?

ANSWERS

- What clients have you worked for?
    - Start-Ups/ Technology:
        - Careem
        - LinkedIn
        - TikTok
    - Government:
        - Saudi Tourism Authority
        - UAE Prime Minister’s Office
        - Government Communication Office
    - Consulting Firms:
        - McKinsey
        - Boston Consulting Group (BCG)

VII

WEB & DIGITAL

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request.

As you might know PrezLab specializes in digital design solutions, including branding & visual identity, as well as web design & development and landing pages for digital marketing campaings.

We have supported a number Start-Ups, and government entities in providing them with full fledged digital solutions & services, ranging from web & app design and development to digital marketing and SEO. Our solutions are tailored to meet your digital goals and objectives. {mention relevant client names if relevant}

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- Do you currently have a website?
- Are you interested in Informative or Ecommerce websites ?
- Who would you say are your 3 main competitors (direct or indirect)
- What would you say the main objective of the website will be ?
- How many pages do you expect the website to have ?
- I would like to schedule a call for you with our Head of Digital Services who can advise you on the best approach for your Digital requirements and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the brand guideline) Can you send us the content right away?

ANSWERS

- Can you give me an idea about pricing?
  - “It really depends on the requirement and the technical scope. Our Head of Digital services can guide you through the different options based on your requirement”
- *If they insist on getting a price range*
  - We offer both Customized solutions and template-based solutions. For templates, it can range anywhere between 20,000 to 40,000 AED based on the required scope. As for customized solutions, your request will need be evaluated by our head of digital services department.
- How does the process go?
  - “It really all depends on the requirement, but ideally the process it set on predefined milestones including requirement gathering, sitemap setup, design & creative, HTML & development, testing and go live. A meeting with our Head of digital services will be required to set the process based on the set of deliverables and technical scope required. **Would {specific date & time} work for you?**

ANSWERS

- What clients have you worked for?
  - Government:
    - Regulations Lab
    - Masdar Institute
    - Zayed Sustainability Prize
    - UAE Prime Minister’s Office
    - Government Communication Office
    - Etihad Credit Insurance

- Start-Ups:

  - BuyAnyInsrurance

VIII

SEO & DIGITAL MARKETING

CALL OPENER

“Hi {lead’s name}, this is {your name}. You reached out through {channel} regarding {service requested}. How are you doing?

Chat

“{Lead’s name}, I’m calling to introduce PrezLab and ask you a few questions regarding your request.

As you might know PrezLab specializes in digital & information design solutions, including branding, web design design & development as well as digital marketing & Search Engine optimization.

We have supported a number Start-Ups, and government entities in reaching their KPI’s through both organic and paid digital marketing. Our services also include providing analytics and a number of tools to gather data and study user behavior for optimal and effective user journey and traffic. {mention relevant client names if relevant}

“So, I’d like to ask you a few questions regarding your request…

Go into questions on next page immediately…

QUESTIONS

- What digital marketing services are you mostly interested in? (Organic SEO, Paid Ads, Analytics, User Behavior, SM Marketing)
- Do you currently have website? Is it SEO optimized ?
- Have you done any sort of digital marketing previously ? What kind ? What was the outcome ?
- Who would you say are your 3 main competitors (direct or indirect)
- Do you require the design an development of landing pages ?
- What marketing metrics do you currently track?
- What is your budget for this project on monthly basis ?
- I would like to schedule a call for you with our Head of Digital Services who can advise you on the best approach for your branding requirements and discuss pricing. Would {specific date & time} work for you?
- We use Google Meet, is that okay?
- (If they have not already sent the SEO monthly reports) Can you send us any SEO or AdWords marketing campaign previous reports that you've completed ? (If any)

ANSWERS

- Can you give me an idea about pricing?
  - “It really depends on what the objective based on your business requirements and budget. Our Head of Digital services can guide you through the different options”
- *If they insist on getting a price range*
  - For Organic SEO it can anywhere between 3000 AED & 5500 AED depending on the number of keywords and how competitive they are. As for google Adwords, it strictly depends on the client’s budget and whether landing pages are required to be designed and developed.
- How does the process go?
  - “A meeting with our head of digital will be required to set the process based on the set of deliverables and what is required.

  Our Head of Digital Services who can advise you on the best approach for your digital marketing campaigns and discuss pricing. Would {specific date & time} work for you?

ANSWERS

- What clients have you worked for?
  - Government:
    - Regulations Lab
    - Masdar Institute
    - Zayed Sustainability Prize
    - UAE Prime Minister’s Office
    - Government Communication Office
    - Etihad Credit Insurance

- Start-Ups:

  - BuyAnyInsrurance

03

OUTBOUND

A

OUTREACH GUIDELINES

IDEAL CLIENT PROFILE

Our Ideal Client Profiles are the customer types that are most likely to stay and grow with our business in the long term

I — Industries

Government

Consulting Firms

Corporates

II — NUMBER OF EMPLOYEES

50+ employees

III — LOCATIONS

KSA & UAE

IV — PERSONAS

Marketing Leaders

Consulting Partners

Heads of Visual Services

Compelling Events & Triggers

Company triggers or personal compelling events mean a company is likely to be a good fit, or that it is simply a good time to reach out

Company Triggers

- Newly established government authority
- Heavily funded government entity (based on new trends and initiatives, for example blockchain, metaverse, gaming, tourism, etc.
- Consulting firm recently doing really well

Personal Triggers

- Newly appointed in role
- Lead is posting relevant content on LinkedIn
- Lead is talking/ has talked at a webinar or event
- Lead has recently received an award or recognition

OUTREACH INTRO GUIDELINE: COMPANY TRIGGERS

Compelling Event	Challenge/ Goal	Customized Intro
Newly established government entity	• Many strategies are being established and pitched to senior decision makers where persuasion is needed • There is no design team, or size of design team is not big enough to handle workload • Entity is aspiring to have resources for various marketing activities	Hi (first name), I noticed that (company name) only recently got established. I'm guessing you have a lot of initiatives that need to be presented or put into reports, but you haven't yet figured out how these you're going to make them look visually impactful to persuade audiences. Open to learn how PrezLab can help?
Heavily funded government entity	• Government entity has received a lot of attention form senior government stakeholders • New initiatives are being put in place that will require a lot of design needs • Entity must compete in terms of brand image and positioning when compared to other government entities	Hi (first name), I noticed (company name) has recently been tasked with (x initiative/s). I'm guessing you're receiving a lot of attention from senior government stakeholders, and would need to present your initiatives in a visually effective way.
WIP	WIP	WIP

B

COLD EMAILING

COLD EMAIL # 1: HYPER-PERSONALIZED

Your talks, ACE, and a sales pitch! External Inbox ×

Ashraf Alkhalili <ashraf.alkhalili@prezlab.com> Sun, May 23, 2021, 2:01 PM

to zrahhal

Hi Ziad,

I've watched your recent talks and whether it's jokes about not wearing pants or shoes, to ACE and the value of vulnerability, or the natural and energetic backgrounds you have used - I have thoroughly enjoyed watching!

As a sales professional myself, I appreciate the fact that you engaged in active listening and prepared really great questions that kept the interviewees engaged and gleaned valuable marketing insights.

Anyways (this is called an awkward transition...)

Ziad, I work with B2B Marketing and Sales leaders who often need to put together visually impressive decks for their largest clients. Normally they would resort to doing the formatting themselves while other priorities await, or ask for help from internal designers that are less enthusiastic about PPT uplifting. Either way, the results might sometimes be visually underwhelming.

We are showing ambitious entities like TikTok MENAT and Dubai Tourism a better way of doing things by working with a niche PPT design agency. Whether it's competitive turnaround times, pricing, or information design creativity - PrezLab has a lot of added value to offer, especially at a time where there is high commercial potential for businesses to bounce back.

Would you mind me recording a 2-min video for you to learn more?

Either way, keep the awesome LinkedIn content coming!

Personalized subject. References things the prospect specifically talked about. Subjects are very important for the person to open your email. This is why showing you took a personal interest in the subject line is such a great way to get someone to click **open.**

This should be **specific** personalization to show that you really watched an interview or read an article. For example, if you just say "I loved your interview"… it sounds insincere. However, referencing WHAT you liked in their interview shows that you really took an interest.

Write something that shows how you related to that content or why you liked it to build a stronger connection with the person and establish some rapport.

Some humor is OK to segue into your pitch. Make the pitch valuable by focusing on what problem PrezLab solves.

Ask for a low-pressure call to action. Don't jump straight into a meeting, but as if the person is interested to learn more. Using "Either way…" at the end of your email also takes the pressure off a little bit so the person feels more comfortable replying to your email.

C

COLD CALLING

GOVERNMENT PERSONAS

Marketing Teams

- Usually receive presentation design requests
- Want to be perceived as the “solution providers”
- Are usually very busy, and want to alleviate pressure to focus on strategic priorities
- Are normally responsible for internal design teams
- Responsible for brand perception and brand image internally/ externally

Presenters

- Usually have to put in extra hours of work to format their own presentations
- Sometimes frustrated from internal design and marketing teams not having capacity to support
- Want to feel confident in front of decision makers
- Want to push their initiatives forward with decision makers

COLD CALL SCRIPT: GOVERNMENT MARCOMMS TEAM

Script A - ENG

We work with marketing teams that are usually asked to help design presentations going to decision makers, where there’s a need to WOW them with the design of the slides.

Normally, they would struggle to get support from internal design teams that aren’t really specialized in presentations, or they would design the slides themselves. But, in the end the design of the presentation wouldn’t deliver the WOW factor and they found it difficult to move initiatives forward with decision makers.

Most companies don’t really consider their presentation design process as something worth looking at, but it can be costing them 1000s of hours a month as well as lost opportunities with decision makers.

Does this sound familiar to you?

COLD CALL SCRIPT: GOVERNMENT MARCOMMS TEAM

Script A - AR

بنشتغل مع فرق التسويق التي ينطلب منهم عادةً المساعدة في تصميم عروض البوربوينت الموجهة إلى صناع القرار ، حيث يكون في حاجة لإبهارهم بتصميم الشرائح.

في العادة، ممكن يواجهوا صعوبة في الحصول على الدعم من فريق التصميم الداخلي الي اساساً غير متخصصة فعلياً في العروض التقديمية، أو بصممو الشرائح بأنفسهم. ولكن في النهاية، ما بكون تصميم العرض التقديمي مبهر كفاية في ممكن يواجهوا صعوبات في اقناع أصحاب القرار.

معظم الشركات ما بتفكر بعملية تصميم العروض التقديمية كأمرً يستحق التقييم، ولكن يمكن أن تكلفهم آلاف الساعات في الشهر بالإضافة إلى الفرص الضائعة مع صناع القرار.

تسمحلي اشرحلك كيف بنساعد شركات مثل ... بهاد الموضوع

COLD CALL SCRIPT: GOVERNMENT MARCOMMS TEAM

Script B - ENG

We work with marketing teams that are usually asked to help design presentations, infographics, and reports going to decision makers, where there’s a need to WOW them with the design.

Normally, they would have to do it themselves, or they would ask for help from internal design teams that aren’t really specialized in presentations and reports. But, in the end the design of the presentation wouldn’t deliver the WOW factor and they found it difficult to move initiatives forward with decision makers.

Most companies don’t really consider their information design process as something worth looking at, but it can be costing them 1000s of hours a month as well as lost opportunities with decision makers.

Does this sound familiar to you?

COLD CALL SCRIPT: GOVERNMENT PRESENTERS

Script A

We work with presenters that usually need to deliver the WOW factor with the design of their slides, especially when trying to push initiatives forward with senior decision makers

Normally, they would have to spend many hours trying to get the design right themselves, or they would struggle to get support from internal design teams. But, in the end they wouldn't feel confident with the look & feel of the presentation and might even face difficulty persuading decision makers.

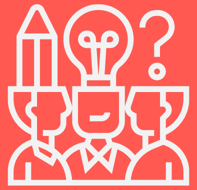
Most presenters don't really consider their presentation design process as something worth looking at, but in reality, it could be making it difficult for them to move initiatives forward, not to mention they have other priorities to worry about.

Does this sound familiar to you?

CONSULTING PERSONAS

Consultants

- Usually in a rush to get their presentations ready
- They like to get top notch quality but without compromising on timelines
- Normally price sensitive
- Want to impress their clients and partners



Visual Graphics Team

- Responsible for providing graphics support to consultants
- Normally handle relationships with external vendors
- Pain point is normally wanting to log off completely during nights and weekends
- Like to be seen as solution providers and take credit for bringing vendors onboard

COLD CALL SCRIPT: CONSULTANT

Script A - ENG

We work with some of the top consulting firms in the region who were dealing with a few challenges including:

- Long turnaround times with internal design teams
- Lack of Arabic support when it comes to presentation design
- Not always getting the high-end level of quality and attention they were expecting

With the strategy consulting market becoming so competitive, they decided to partner with us so they can make sure they are not missing out on opportunities to close proposals and retain clients.

Would you be open to learning a bit more about our information design services?

COLD CALL SCRIPT: CONSULTANT

Script B - ENG

We're helping some of the top consulting firms in the region improve their proposal closing rates and client retention with our specialized presentation design service.

I don't want to give you a full-blown sales pitch so to keep it simple what you could expect is:

- Happier clients due to high-end visual graphics support in AR and ENG
- Quick turnaround times with night and weekend shifts
- Dedicated project management teams that can get on calls with you for easier briefs

I know you probably have an internal design team supporting, but would it be a bad idea to discuss how a regional vendor might help you deal with capacity issues and help you achieve your KPIs?

COLD CALL SCRIPT: HOW TO CARRY ON THE CONVERSATION

The most important thing to keep in mind in terms of carrying on the conversation is NOT to let the prospect take the lead. The golden rule here is ***"He/ She who asks, controls the conversation"***

Make sure you are staying respectful and answering the prospect's questions in simple, succinct lines. But ***always*** *take the lead again and keep asking your questions. What you want to ask to show your expertise is the below:*

- How often are presentations used at {company}?
- What types of presentations do you usually have?
- Who are the usual audiences of these presentations?
- How important do you think the visuals are for these audiences?

If you have established a decent rapport and gathered some basic information about the prospect's situation, go for the meeting. Make your ask casual and straight to the point:

- {Name}, I believe there's a lot of value we can bring to {company} similar to what we have done for clients {A, B, C}. Can we have a 30-minute call on DAY/ TIME to highlight some of the key issues we can help you solve?

COLD CALL SCRIPT: HOW TO ANSWER QUESTIONS

It's very important to answer the prospect's questions without letting them lead the conversation. Here are a few of the Q&A you'll need:

- What do you guys do?

We're a specialized presentation design agency that helps presenters engage and impress audiences without having to spend hours on their presentations. On that note, I'm curious about…

- Where are you based?

We have offices in Dubai, Amman, and soon in Saudi as well. By the way, I wanted to ask about…

- How do you work with clients?

We have various business models that fit different organizations sizes, ranging from Ad-Hoc rate cards to retainer agreements where we dedicate a designer, art director, and project manager to your team. Speaking of which…

COLD CALL SCRIPT: HOW TO ANSWER QUESTIONS

It's very important to answer the prospect's questions without letting them lead the conversation. Here are a few of the Q&A you'll need:

- What's this about?

I appreciate that you're busy {name}, if you'll allow me 30 seconds, I'd love to tell you why I'm calling

HANDLING OBJECTIONS

Use the Chriss Voss technique

MIRROR

Mirroring builds empathy and trust. It shows that you are truly listening but also gives you a chance to further understand what your prospect means. Mirroring is simply done by repeating the last few words a person said with an upward inflection. For example:

"Already working with another vendor?"

REPEAT

Repeating further shows that you are empathizing with the prospect and not trying to "overcome" their objection. You are showing that you are not going to be pushy, but instead that you truly want to understand the worldview of your prospect.

"I see, it seems that your current design vendor has been quite good to you!"

ASK

Now that you have shown your trustworthiness and empathetic nature, it's time to offer an alternative perspective. The prospect will be more open to hear you out since you're not being pushy. For example:

"I understand what it's like to have built a long-term relationship with a vendor, and I'm not saying you should make any switching decisions at this point. I just think it would be good for you to know what's in the market and what a specialized presentation design firm might do differently, would it be a terrible idea to have a 30-minute call just to learn more?"

SPECIFIC OBJECTIONS

We have an internal team

- *Slow down and breathe*
- Repeat the last few words with a curious tone: *Internal team? (Shush)*
- I see, it sounds like they're doing a pretty good job with enhancing presentations *(Shush)*
- Totally understand that the team has got this covered, and of course all our clients are still relying greatly on their internal design teams. The one thing we've noticed however is that most designers practice to become brand and marketing designers, and very few have built a specialized capacity for presentation and information design. Not to mention that presentation design requirements are usually required on urgent basis which ends up frustrating design teams and disrupting their day-to-day tasks. Would it be a bad idea just to learn more about this and get a better understanding before deciding on anything?

SPECIFIC OBJECTIONS

Send me an email

- *Slow down and breathe*
- Sure, I’d love to send you an email! Is your email abc@company.com?
- Okay great, I promise to send that email. By the way, I really hope this doesn’t sound rude but could we also set aside 30 minutes on the calendar to talk, in case you like what you see in my email? If you don’t like what you see, you can just reject the calendar invite, does that sound fair?
- Great! How about Wednesday at 3 PM?

SPECIFIC OBJECTIONS

We have a specialized PPT designer. He/She does outstanding work

- Slow down and breathe
- Repeat the last few words with a curious tone: specialized PPT designer?
- Ok, it sounds like he’s doing a pretty good job for you guys!
- Out of curiosity, does he ONLY work on presentations?
- I see… well several of our clients also had their own specialized designers. However, they were surprised to see our innovative approach when it comes to presentations. Would you be against just taking a look into this.. In case you guys have more volume of presentations in the future?

SPECIFIC OBJECTIONS

We are already working with another agency

•Slow down and breathe

•“Another agency?”

•Ok, it seems like they are doing a pretty great job for you

•Look, I’m not asking you to stop working with your current supplier immediately, on the contrary, all our clients are actually working with multiple agencies. I just think it would be good for you to know what’s in the market and what a specialized presentation design firm might do differently, would it be a terrible idea to learn a bit more about this?

SPECIFIC OBJECTIONS

I need to share this with the team, before booking a meeting with you

•Slow down and breathe

•“Sure, no worries at all. Do you mind me asking which colleagues or departments might be relevant to this conversation?”

•“Great, I think it makes perfect sense to include them in the conversation. Would you mind me sending you tentative invite for Wednesday at 3 PM. Until then, you and the team would have had time to review our portfolio. And you can either accept the meeting or reschedule – or if you don’t like our portfolio, you can reject the invite – no problem at all”

04

CLOSING

05

ACCOUNT MANAGEMENT

What is Account Management?

Account management can be broadly defined by any set of activities that are meant to retain, nurture, and grow existing client accounts. Account management activities may include:

- Account reviews to cover utilization and trends
- Managing sales inquiries from an existing and contracted client
- Up selling and cross selling existing accounts
- Negotiating and renewing contracts, retainers, agreements, etc.
- Initiating Account Based Marketing initiatives in collaboration with Marketing teams (one-pagers, explainer videos, etc.)
- Resolving complaints and conflicts
- Proactively pitching innovative new ideas
- Regular check-ins with repeat customers
- Ensuring satisfaction ratings are being met by conducting surveys and feedback calls
- Many more…

Account Reviews

What is an Account Review?

An Account review is a meeting conducted with the primary contact of an account to go over how the commercial relationship has been going. Some of the topics discussed in this meeting are utilization and hours worked, types of services requested, demand trends, challenges, recommendations, and more.

Purpose of an Account Review:

- Give the client a sense of how healthy (or unhealthy) the relationship is being
- Give insights on demand trends and how they can be useful
- Bring up areas of challenge, and supplement them with actionable recommendations which can drive continuous progress in the relationship
- Give the client a chance to raise questions and concerns in a proactive manner. Give them a sense of safety to speak out so you can root out red flags (if any) early on

Download account review template here

Access Account data & reports here

Measuring client satisfaction

Why is measuring client satisfaction important?

We might hear the odd good feedback through email every now and then, but a **quantitative and qualitative** measuring system is critical to ensure we are doing our best to give all clients an ideal experience. Of course, every now and then a client might have a bad experience with us, which makes it even more important to be able to capture their feedback and make them feel heard.

Benefits of measuring client satisfaction:

- Gives a sense to clients that the vendor actually cares about their experience with us (empathy and relationship points)
- Influences upselling and cross-selling opportunities in direct and indirect ways
- Providing accurate data to teams and management regarding what we're doing good, and what areas of improvement we have
- Helps us reflect a positive image during our account review meetings
- Helps guide our decisions and confidence regarding the potential of certain accounts versus others

View client satisfaction form here

Measuring client satisfaction: BONUS

Christelle AbouNader (MiddleEast)
to Strategy&, MER, me, Carla, Farah

Fri, May 20, 3:09 PM

Hi Ashraf and the Prezlab team,

Thank you for your email.

We just got an urgent request from the client and we would need some support this weekend (~5 slides for uplifting due by Sunday night).
Please let us know if you can help us with this, in this case I can share the slides with you tonight, and have a call with whoever will be working on them.

Thank you.
Best,
Christelle

Strategy&

Part of the PwC network

Dr. Christelle ABOU NADER

Mobile UAE: +971 56 688 4158 | KSA: +966 53 900 2326
Email: christelle.abounader@strategyand.ae.pwc.com
Strategy&, Al Fattan Currency House, Tower 1, Level 8
Dubai International Financial Center P.O. Box 506782

...

On Thu, May 19, 2022 at 11:03 AM Ashraf Alkhalili <ashraf.alkhalili@prezlab.com> wrote:

> Hi Christelle,
>
> Thanks so much for the feedback over the call today.
>
> I understand your first experience with us was not so great, but that the second task you sent us went very well.
>
> As discussed, please feel free to always ask for a call from our team in case you feel the task needs further clarification, or if you have high-end expectations to make sure we are always aligned.
>
> We make sure to try our best and align over calls for every request, but even in case we forget, you can always share your mobile with the team and they will give you a quick phone call even if you are on the run.
>
> Looking forward to our next job together, thanks again!
>
> Kind Regards,
> Ashraf Al-Khalili

Here's an example of how calling a client and checking in on her feedback got us the easiest deal ever!

Handling sales inquiries from existing accounts

Sales inquiries from existing accounts normally have a low level of friction since we normally have a contract or rate card agreement that is fixed with them.

Friction is so low in some accounts, that inquiries are handling directly by the operations team members. For example, Strategy& is completely handled by the operations team in terms of quoting and getting approvals. Other accounts are a little more complex and require a bit of sales knowledge to be able to capitalize on opportunities.

Just follow the guidelines in the section called SCOPING AND PRICING.

It is also important to understand and appreciate the large potential of up-selling and cross-selling existing accounts, especially when an inquiry comes in. Make sure you are proposing something that is **actually valuable,** if you are indeed trying to maximize the opportunity.

You can do that by suggesting amplified instead of enhanced, suggesting uplifting the client's template, or perhaps providing them a printable booklet in addition to the presentation they requested.

Reaching out to clients in an exiting account

Not only is there little friction to try and approach a client within an existing account, but there is actually a high chance that the client has heard of us and might be very open to meeting and discussing collaboration. Below is one example:

Marco Guarda (MiddleEast) <marco.guarda@pwc.com> Mon, Jan 24, 8:04 AM
to Ancy, me

Hi Ashraf many thanks for reaching out - yes a couple of my teams are already using your company's services. Let's have a quick 20min call so I can better understand the services and pricing.

@Ancy: can you please set something up with Ashraf? Ideally Wednesday/Thursday.

Cheers
Marco

Sent from my iPhone

On 24 Jan 2022, at 8:05 AM, Ashraf Alkhalili <ashraf.alkhalili@prezlab.com> wrote:

Hi Marco,

I noticed from your LinkedIn that your extensive experience working with EY, McKinsey, and now PwC. Was wondering if we might be able to support your initiatives - PrezLab is an approved design vendor for PwC ME.

We are supporting partners and directors across the region to impress and influence senior stakeholders with high-end design support for client deliverables, proposals, infographics, videos, etc.

Our services have garnered a 4.5 satisfaction rating so far - feel free to go through our services and samples here.

Are you open to having a quick call, or connecting us with your team to explore? Please let me know.

Kind Regards,
Ashraf Al-Khalili

Collaborations with Marco Guarda, a partner at PwC have so far resulted in over 30,000 AED in won revenue.

That excludes any referrals that we are not aware of.

He also referred us to a friend working at EY!

It all started with a very casual email.

Reaching out to clients in an exiting account

You should also try to reach out to partners who approached us before and showed potential in terms of future recurring revenue. Here's another example:

Nicolas Mayer (MiddleEast) <nicolas.m.mayer@pwc.com> Wed, Nov 10, 2021, 4:45 PM
to Joey, me

It will be a pleasure - Joey could you please set up ?

Sent from my iPhone

On 10 Nov 2021, at 4:40 PM, Ashraf Alkhalili <ashraf.alkhalili@prezlab.com> wrote:

Hi Nicolas,

How are you doing?

Can we set up a chat next week to learn more about the projects you and the team work on, and share with you the various ways in which we might support?

Maybe Monday 15th, 3 PM UAE time? Please let me know if you prefer another time and I'll make it happen.

PS: How did everything go with your client submission? How was the team's feedback overall?

Kind Regards,
Ashraf Al-Khalili
Head of Business Development WhatsApp Me

Collaborations with Nicolas Mayer, who is leading the tourism consulting unit at PwC have thus far resulted in over 100,000+ AED in closed won revenue!

We also helped Nicolas's team win large proposals worth millions of dollars with our presentation design expertise. We have become an invaluable resource to Nicolas and his team.

CLIENT COMPLAINTS

What’s a client complaint?

A client complaint is a communication that we have received that relays frustration or dissatisfaction with how we have handled a certain project, whether commercially, operationally, creatively, or a mix of several factors.

Why do complaints happen?

There are various reasons why a situation might reach the level of a client making a complaint. Some of these reasons might be:

- Perceived unfairness of how certain commercial terms have been applied
- Perceived underperformance in terms of communication and project management
- Perceived lack of creativity or quality assurance in a certain deliverable
- Any other factors that are perceived as unsatisfactory in terms of the agency’s conduct

What’s the best way to avoid a complaint

While this might be a document or topic on its own, the best way to avoid complaints is of course to build a solid retention framework that includes commercial, operational, and creative aspects. Having said that, complaints are inevitable and bound to happen in every agency.

STEP 1: TAKE AN OBJECTIVE STANDPOINT

Don’t take it personally

The most important thing to remember when dealing with a complaint is not to perceive the complaint as a personal attack or dissatisfaction that reflects on your personally. A complaint is nothing more than a frustrating situation for a client that culminated in their decision to express their anger or exasperation.

Analyze the situation

Mistakes happen, and no project ever goes 100% perfectly. There must have been certain aspects that caused the client to reach such a level of frustration, and the first step is to investigate the project and hear both sides before reaching a conclusion. Some of the questions we can ask:

- How was the flow of communication between us and the client?
- What kind of expectations did the client have of us, and were they clearly documented and agreed upon?
- Were there any aspects that we could have handled better in terms of the commercial, operational, or creative aspects?
- Were there indeed any shortcomings or lack of adherence from our side that caused this situation?
- Were there any shortcomings or lack of adherence from the client’s side that caused this situation?

Make a conclusion

After analyzing the situation, you are in a much better place to deal with the client, especially that you have gained full context into the what, why, when, and how this situation occurred in the first place. Now, you are ready to speak with the client.

STEP 2: DON'T TALK, JUST LISTEN

<u>Listen actively to build trust and mutual understanding</u>

You need to make the client see that you care, not by saying that you do, but by simply hearing them out. Active listening is one of the most powerful tools at your disposal to build trust and understanding between you and another person. People like to talk and let out their frustration. You can encourage them not necessarily by **agreeing** to their point of view, but by simply **acknowledging it.** Here are some tactics you can use to do that:

- Rephrase the situation to help them believe you can really see the situation from their point of view. You can do that by saying things like:
  - *"It seems like the situation has reached a frustrating level for you…" and let them talk…*
  - *"I can definitely see how this might have caused a lot of frustration…" and let them talk…*
  - *"I can imagine this has not exactly been the best project from your point of view…" and let them talk…*

- Empathize and acknowledge. This will further build trust and understanding, and put you in a better place once you want to give your point of view on the situation:
  - *"I can see your point of view on how XYZ could have gone better, I would be just as frustrated to be honest…"*
  - *"This project could have definitely gone better; I totally understand how it reached this level of frustration…"*

STEP 3: RESPOND

Recap the situation from A – Z without getting into why or how

Simply restate the entire situation from X to Z without getting into why and how the error happened. The goal of this is simply to communicate to the client that you heard them out completely and understand what happened in their world. You simply want to get them to say, “That’s right”. Here is an example of how you can do that:

- *“So based on my understanding so far, it seems that what happened at the start of the project is XYZ, you had an expectation that ABC, and due to XYZ, the situation reached an exasperated level, did I miss anything?”*

If mistakes happened from our side, acknowledge them in a simple and calm manner

As an agency built of humans, we are bound to make mistakes. An overbilling, a miscommunication, or a creative miss could happen to any one of us. The point here isn’t to be overly apologetic since mistakes happen, but simply to acknowledge the mistake/s. Acknowledging mistakes builds trust and establishes strong human connection since people can appreciate humans or agencies that show vulnerability. People cannot, however, trust and empathize with a person or agency that never claims any wrongdoing or avoiding acknowledgement into a mistake. Here’s what an acknowledgement sounds like:

- *“Name, I can indeed see that aspect XYZ could have been handled better. Repeated mistakes in this area culminated in an entirely frustrating situation for you, that might have even had ABC business impacts. Regardless of how well our collaboration has been going so far, this is definitely NOT what we wish for our clients, and you have every right to be frustrated”*

Notice in the above response that there is no use of the words “however” or “but”. It is a clear acknowledgement, straight and simple. Give the client a chance to digest this fact and see that you are not being defensive at all. If you have done the steps one by one at this stage, you have gained the full trust and mutual understanding with the client.

STEP 3: RESPOND

If the client is at fault

Obviously, there will be situations where the complaint of the client has little to no actual merit. It is extremely vital that we don't allow our personal biases to let us reach this conclusion too soon and make a full objective analysis before concluding this. Having said that, clients may often send wrong briefs, share semi-final content, give creative guidance that doesn't align with their stakeholders, etc.

In such a situation, it is really important that we do not directly blame the client or communicate outrightly that we think they are at fault. The best way to tackle this situation is not to refer to people, but to refer to situations that could have been handled better. It is also healthy to provide alternatives or solutions for how we could help prevent this situation in the future to gain the collaboration and trust of the client. Here are some ways in which we can phrase our arguments:

- *"Name, it seems that what happened in this situation was that we received content that may have not been necessarily final or aligned with all your internal stakeholders. Naturally, this caused some errors in the way we designed the content, ultimately reaching this level of frustration. What we can do to help next time is to double-check that the content is indeed final with you before proceeding with the design. Would you have any suggestions for us in such a situation as well?"*

Notice that you have not acutely named a person as being at fault in this situation. You have simply stated clearly and factually why the situation happened without referring to it as a "mistake". You have also offered ways in which you would handle the situation differently in the future and asked for the client's suggestions to gain their full favor and collaboration.

It is worth mentioning here that clients often need to be guided for how to manage the creative process from their end. Often, our clients are not savvy when it comes to design projects and may make mistakes along the way. This could be an entire document on its own, but the key here is to **guide the client and educate them throughout the creative process, so that they are not guiding us in the wrong direction. A patient cannot go to a doctor and tell them what kind of medicine they need, it's the job of the doctor to guide them through the process.**

STEP 4: COMMUNICATE YOUR CAPA

Make it right, and prevent it in the future

A simple methodology used in the best pharmaceutical companies in the world to deal with complaints is called CAPA. This stands for **corrective action** and **preventive action.** This could be an entire document on its own, but the idea here is that CAPA is a wonderful way of not only improving the internal processes of the agency, but also of building an even higher level of trust with the client to show them how adaptive and agile you are being in tackling issues.

Corrective action

Firstly, you need to communicate to the client what you are doing to make things right. This could be a discount, an extra level of iterations, a visit to their office to manage the project on ground and get it to successful completion, etc. The goal here is simply to show the client that you are making all efforts to resolve the situation and come out of it with a positive outcome. This will really show that you are sparing no resource to help the client in a constructive and collaborative manner, without dwelling on the issue itself.

Preventive action

What's the use of mistakes if we can't learn from them? Through an adaptive and agile mindset, human beings and agencies alike can evolve their processes to reach closer and closer to perfection. While no agency can be perfect, it might as well have a mindset of attempting to become perfect through the strategic application of **preventive actions.** These are often padlocks that are put in place to reduce the margin of human error to a minimum. Some examples can be augmenting our CRM, Project management, or creative software's with non-human elements like reminders or mandatory fields. This can be implementing new processes to improve commercial, operational, or creative outcomes. From a client complaints point of view, it is vital that we not only put in place preventive actions but that we communicate them clearly. In pharmaceutical companies, quality control departments will often share images and evidence of a new machine that they put in place to prevent an error from occurring again. This can serve as inspiration for how we can communicate preventive actions with clients.

WHAT NOT TO DO

Below are some guidelines on what not to do when it comes to client complaints:

- Don’t take it personally. Take a moment to remove yourself from the situation and assess as if you were an outsider
- Don’t keep the conversation on email. Especially in moments of anger or frustration (on both sides) textual communication can be easily misinterpreted and leave room for further misunderstandings. If you can, always call. Always.
- Don’t blame anyone (yourself, your team, or your client). Mistakes happen, it’s as simple as that. It’s how we deal with them and use them to our advantage that truly makes a difference
- Don’t be vague in your response. Often, we might try to avoid acknowledgement especially if we are still in a moment of heat or anger. Speak calmly, and clearly
- Don’t delay or avoid acknowledgement. If there are clear issues that happened from our side as an agency, be quick to acknowledge them. Don’t dwell on the issues too long especially if you are still in the “corrective action” phase, but don’t avoid acknowledgement either
- Don’t say “sorry” unless there has been a clear violation or misconduct on part of the agency. Such examples include breaches of contract, violations of trust and confidentiality, clear disregard or lack of attentiveness to a certain issue, etc.

THANK YOU