Beyond The Agency Box

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The Phoneless, Meetingless Digital Marketing Agency That Creates Lifetime Happy Clients

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Chapter 1: Why? The More Beach, Less Laptop Agency

You are about to discover a brand new kind of digital marketing agency that is *more beach and less laptop*. Whatever *your beach* is.

You will reimagine, reengineer, and revamp everything you have been told you “have to” do. This new type of agency doesn’t require being on the phone all day. It doesn’t require constantly checking your email or having endless client meetings. In fact, it will actually *empty your calendar* as you earn 7 figures and beyond.

At the core of this book is one big idea. You deserve a life of freedom while your income continues to grow. You will create this new life while also making a profound difference in your clients’ lives in the simplest and most direct way possible.

This may sound simple and obvious, but in actual practice it is very rare. Very few people in our society create money and freedom *together*. As money goes up, time and freedom goes down.

There are hoards of very “successful” doctors and lawyers who missed their children growing up. Many have big bank accounts and failed marriages.

Of course, being a broke freelancer struggling to pay rent shouldn’t be your goal either. You don’t want all the time in the world with endless money stress.

This book will guide you to that sweet place where you become abundant in time and money *together*. You will experience what only true freedom can buy. There is a heavy emphasis on quality of life.

Why the more beach, less laptop approach? Because no one talks about how creating a highly successful digital marketing agency is actually one of the hardest businesses in the world to scale. If you're not careful, you can easily build yourself a high-paying prison. While it’s a great way to get started with little capital, it’s actually very hard to play in the big leagues. As you get more clients, it typically demands more of your time and energy. It’s easy to burn yourself out and be overworked. It’s hard to remove yourself.

That’s why I created this book for you. It will help you through the hundreds of potential pitfalls that exist with running a successful agency. It will help you remove yourself from the day-to-day operations, so you can be the visionary. It will help you grow your agency with high value, low maintenance clients who are thrilled by the results they get and love working with you. You will have clients who rarely call you because you’re keeping them well-informed and delighted.

This book will help you create more partner style relationships, thus getting *leverage* on your time and growing assets. This means you will do the hard work once and then copy and paste what works for more money. As one of my mentors says, “I like to do things once that I can get paid for again and again.”

These are the lessons I’ve learned since 2007 through building 3 different agencies to 100+ clients and helping 1000s of agency owners worldwide to embrace more beach, less laptop.

Why did you decide to work for yourself? Why did you choose *this* path? Of all the unlimited choices you had, why did you start a digital marketing agency?

Why didn't you just get a regular job like everybody else? Why didn’t you take the “easy way out”?

Why did you put in time and effort learning these skills? Why do you want to share those skills with other deserving businesses? Why not just keep these secrets only to yourself?

I'm willing to bet that you had reasons. Damn good reasons. However, I bet the reality of things looks and feels *just* a bit different from your dream, doesn’t it?

Does This Sound Like Your Agency?

Do you spend most of your days working isolated by yourself on a computer? Are you the only one you know working late on a Sunday night when everybody else is taking it easy?

Do you find yourself checking your email more than 20 times per day? Do you feel constantly tethered to your phone like it’s an electronic leash? Is your calendar fully booked some days? Do you spend the last moments on your pillow at night worried about how you will get results for your clients?

Do you sometimes feel like "working for yourself" means you have a dozen different bosses? Do you end up in client-underling relationships where you are the underling? Does more clients mean more "have tos"?

Do you feel the pinch of rising ad costs? Do you ever worry about the next ad account being shut down? Do you ever worry about the next Google update?

How much of a typical day is spent looking at lead accounts? Checking client deliveries? In client meetings? Making reports and trying to justify your retainer?

Do you make sales calls? Write proposals? To clients who often just disappear? Do you have to ask if they even read your proposal yet? Do they ghost you without just being honest about "I'm in" or "I'm out"?

Have you ever had a pain in the ass client? One who wants constant meetings? Has a client ever spoken to you in a condescending tone? Even when you do a good job, do clients leave after just a few months?

Do you ever hate the never-ending tech errors and issues? Are you constantly learning the latest software? Ever spent 3 hours on Google looking for a solution? Ever stared at a screen trying to find an unknown error in 100 minuscule lines of code? Do you ever have 20+ tabs open in your browser?

What about the clients? Are they not the hardest part? Do you have clients who expect miracles overnight? Do they suck at answering the phone and then blame your leads?

Do your clients hand you a broken funnel, a broken message, a broken offer, and a broken website and expect it to work *instantly*? Do you know your campaign needs months of testing to dial things in but your clients don’t give you enough time? Is yet another client shocked when they get their ad bill and they aren’t *overnight rich* yet?

Do clients not really fully understand what you’re doing for them or why you’re doing it? Do you have some clients who frankly don’t pay you well? Are you often waiting on responses from your clients to get things done?

What about your time and freedom? Do you need to do 100 things first before you can enjoy a week away? Do you still get client messages anyway? What would happen if you took 2 months off? Would there still be a business to come back to?

What about cash flow? Do you ever feel like you have to take any client with a credit card and a pulse only to regret it later? Are you the one who shoulders all the blame and responsibility?

That’s a typical agency and it's a pretty thankless job, wouldn't you say?

What If Your Agency Could Be *Different*?

What if an agency didn’t have to be like that? What if there was a better and easier way? What if you could have the benefits of the monthly recurring cash flow and it didn't require you to do all of those things?

What if you had actual time and freedom together? What if you didn't even have to check your email or your phone for days or even weeks at a time?

What if you didn't have to have any meetings at all? What if every new client was already pre-sold before they even got on the phone with you? What if a ‘sales call’ was a 3 minute formality where you just processed a credit card over Stripe?

What if you didn't have to put your entire financial livelihood and sanity in the hands of the almighty Google or Facebook?

What if *success* meant you could look at your calendar and not see a single damn thing on it? What if a typical average day had nothing you “have to” do?

What if you could copy and paste what worked for one client and reuse it over and over? What if you had a team of A+ superstars and systems to do almost all of the heavy lifting for you? What if those systems ensured everything was done the right way every time? What if it was not only easier for you but also better for your clients too?

What if you could carefully choose only the clients who were like “friends with money”? What if you had a premium priced service that gave you big margins? What if you had clients because you really believed in their products and services? What if together your work made the world a better place? What if you only had fun with your clients?

What if you weren't dependent on ads or SEO in the first place? What if another Google update or ad account shutdown was just a minor annoyance?

What if your savings grew passively and automatically in the background? What if you could get paid while your drooling head was still asleep on your pillow? What if you worked only when you felt like it? What if you could do most of the work on a notepad at the beach? What if you didn’t even have to have a phone or a computer at all? What if you never had an urgent client or employee message ever again?

What if you worked once and then you got paid for it again and again? What if you could get every client results within the first 48 hours? What kind of trust and credibility would that bring? What if your clients saw you as a partner, investor, or highly skilled consultant instead of as their underling to boss around?

What if you could do this while travelling around the world? What if you could experience multiple different countries? What if you wake up on a beach in Thailand? What if you could have a delicious butter pastry in France? What if you could see the crystal blue waters in Lake Louise Canada? What if you could actually have a successful agency *and* have the time to live a very cool life?

What does *freedom* mean to you? What if you actually had time, space, and leverage to just be? Would you learn a new language? Would you eat some great food? Would you have sex in the middle of the day?

What if your business had almost zero stress? What if you felt good about what you were doing every day?

Most importantly, what if that was *real*? Like really, really *real*. What if that was not only possible… but possible *for you*?

If you've been running an agency for a while, I know that probably sounds unbelievable. Your 'bullshit detector' may be going haywire. If so, that's totally understandable. I used to feel that way too.

I probably would not have believed it either. Except that's been my life and my clients' lives for many years now. We've learned to escape the typical agency trap of working for money and being subservient to clients. We've escaped having to reinvent the wheel with every new client. We've escaped running an agency that isn't really scalable. We've escaped an agency that creates a tighter electronic leash to your phone and email as you become more successful.

We've escaped running a boring typical agency the way everyone else does it. This book is here to help you escape it too.

Most people in this world aren't really living. For many, they only live for the weekends. Others are waiting for retirement before they truly start living. You don't have to wait 30 years to have a cool life. You don't have to do a bunch of shit you don't want to do so you can *hopefully* experience something cool later.

If you're ready to escape the trap of trading services for money and being your client's slave, strap yourself in. Inside this book you will find some massive wealth, time, and leverage shortcuts. You're going to discover a new model of running an agency called a "Beyond Agency". This will reimagine and reinvent everything you've been told that you "have to do".

In applying these principles, you will be able to live on your own terms. Your digital marketing business will work for you instead of you being prisoner to it. It will actually scale in both freedom and money together. This will allow you the framework to design yourself a really cool life that's filled with beautiful *experiences*.

That means doing *what* you want, *when* you want, and with *who* you want. It means running your business with purpose and passion. It means doing only what's fun that you're also good at. Are you ready to have a successful *less laptop, more beach* lifestyle agency?

Real talk: There are other books that will teach you better Facebook ad skills, a better outreach script, or a better airtight client contract. This book is the premier resource for having an agency that gives you a cool life. Whatever your 'beach' is.

If that's for you, read on.

Chapter 2: The 5 Stages Of Agency Growth

Before we get into how to create a new type of agency, where are you *now*? Which stage is your agency in?

This is extremely important because knowing where you are and *what you really need* is how you truly move the needle. Most agency owners are unknowingly solving the wrong problems. They are usually addressing a surface level symptom. Without truly understanding the deeper underlying issue, they don't really advance forward.

One of my clients was doing a cool $1.2 million per year. He wanted to grow further but he was upside down on his cash flow. His employees were getting paid but he wasn't. His agency was already sucking the life out of him. He was stressed most months that he might not be able to make payroll. He dreaded the idea of laying somebody off because he couldn't figure things out.

He was seriously contemplating just blowing the whole thing up and starting another less complicated business model. He thought maybe he could sell a course and have none of the agency headaches. When you are scaling and upside down on your cash flow situation, it’s tough. If you’ve ever been there, you understand his stress.

Plus his clients demanded things from him all day, every day. As he so eloquently described it, “It’s like I have 100 different bosses.”

It was confusing because he didn't realize that what got him to his current level of success is *different* than the skills needed to get to the next level.

What Got You *Here,* Won’t Get You *There.*

Every stage of agency growth requires new skills. What got you to $10K won’t get you to $100K. What got you to $100K won’t get you to $1M.

Should he hire before he could afford it or wait until cash flow allowed it? How did the big boys land the million dollar contracts? What sort of margins should he be working towards?

He built the entire business from zero already. He got to his first $10k/month through hard work and sheer determination. At $100k/month, he was already hustling so hard that Gary V would have gotten a massive erection.

Hustle alone won’t unlock the next level. Working harder won’t add another $100K per month. He can’t just wave a magic wand and create more hours in the day.

In fact, he'll only make more when he actually *works less*. He needs teams, processes, people, systems, and leverage. Only a well-oiled machine will allow him to keep scaling or at least cruise on autopilot.

What do *you* need to reach the next level? You need to know firstly which stage you're in, what your real challenges are, and what are the real problems that need to be fixed.

Stage 1: Freelancer Freddy

What you're doing: Everything. Janitor/CEO/Web Design/etc. You're designing the logos. You're taking the sales calls. You're generating the leads. You're the WordPress person. You're the one running the client campaigns. You're the one emailing clients back when they have a question. In this stage, if you take a month off, there won't be a business to come back to.

What it feels like: Fighting fires all day. Wondering where to get clients from.

What the biggest problem you have is: You're usually wondering how you can get more clients. Your biggest problem is client acquisition.

How to solve it: You need working processes and systems of client acquisition. You need an *irresistible offer* that makes your sales flow downstream. You need something that makes your agency stand out from the noise. You need a systematic way to get that offer in front of your target buyer.

Typical income: $0-20k/month

Stage 2: Small Team Steve

What you're doing: You’re still doing much of the work. Now, you’re also managing people.

What it feels like: It's easier just to do it myself. Everyone else around me is incompetent. No one does it right but me. You carry 10x as much work as anybody else in your agency. Delegation is hard.

What the biggest problem you have is: Hiring and retaining A+ superstar employees and freelance help. You probably have B and C players. They're not good enough for you to truly "let go" and trust them to do a good job. It seems like you’re the only one who cares about quality and attention to detail.

How to solve it: Systems for hiring, training, and retaining superstars.

Typical income: $20-50k/month

Stage 3: Mark The Manager

What you're doing: Managing a team. You are a full time manager in daily support of your staff and their issues.

What it feels like: Constant interruptions. Every conversation starts with, “Hey, do you have a minute?”

What the biggest problem you have is: Managing by firefighting. Management is ‘reactionary’ to issues, dealing with them as they come up. You are probably busy doing whatever employees dump in your lap. Every decision depends on you and so you become the bottleneck in your own agency.

How to solve: Manage by benchmarks and fix systems, processes, and procedures. You have to know your numbers and use that to guide your decisions. Your effort needs to be focused in the right places. There are 5 to 10 key performance indicators that define every agency. You have to know your key numbers and work at the right problems proactively. Only solving the right problems will move you forward. You have to focus your team on solving problems based on your key performance indicator numbers.

Typical income: $50-200k/month

Stage 4: Chuck The CEO

What you're doing: Managing managers. Deciding on high level opportunities.

What it feels like: You're no longer involved in any "day to day" operations. Finally you get to do the shit you like doing. You’re only focused on creative work.

What the biggest problem you have is: The quality of your brand slips. Suddenly you have stuff falling through cracks. Your business is "political" and you have cliques. "I heard Joey got promoted because he goes golfing with Debbie." You have departments within the company that are at conflict with one another. People try to look good instead of serving the client.

How to solve: Fall in love with your clients again. Get back to the basics. At scale.

Typical income: $200k-500k/month

Stage 5: Franchising Frank

What you're doing: Living like a Cuban drug lord. Creating multiple agencies or dominating multiple niches.

What it feels like: Constant opportunity overload. People are constantly bringing you new opportunities, investments, and ideas. You barely have enough time in the day to evaluate them, let alone do them all.

What the biggest problem you have is: Cloning your systems from agency to agency. Finding A+ players gets harder and harder as you grow. Talent becomes your biggest bottleneck.

How to solve: I legit have no idea. I have never been in this stage. Though I do have a few colleagues, friends, and clients that have shared their experiences here. They say you need a strict set of criteria to decide what opportunities are in your wheelhouse. You need to constantly be recruiting for top talent.

Typical income: Rapper money.

As for you, you probably don't want a rapper mansion that's worthy of 10 minutes on MTV Cribs. You probably don't want to have an international brand franchise either.

You probably just want to have a really good "lifestyle" agency. One where you can earn 7 figures or more on your laptop and hang out on your beach. One where you actually have time to be with the people you love most.

These stages are here to help you get clear and then get unstuck. Reread them when you need to. It is a reminder of what is your most important and biggest challenge. Quantum leaps forward happen when you identify your *biggest constraint* and *solve it once and for all*.

Chapter 3: The Riches Are In $100 Bill Sub-Niches

What is a sub-niche and why choose one? There are 4 very important reasons to choose a profitable sub-niche.

Reason #1: It's Energy Efficient

It creates the possibility to *do something once* and *get paid twice*. In other words, what you do for one client is reused for the next client. This is the secret to scaling easily.

Reason #2: Your Sales Message Has "Bite"

By far, the biggest reason most agencies have a weak sales message is because they lack any *meaningful specifics*. Every niche has its own lingo. By having a clear niche, you can laser focus your message to say something specific, powerful and persuasive.

Reason #3: You Can Strategically Go Get Clients

Try to speak to everyone and you won't to know where to go. Yet the minute you niche, this gets clear. Want to go meet a nurse? We can go to the hospital.

Want golfers? We should go to the golf course. Want strippers? Let’s go the strip club. When you decide on a niche, you can strategically go where they already are. This is nearly impossible to do if you’re a generalist trying to talk to anyone and everyone.

Reason #4: *Custom* Doesn’t Scale, But *Customization* Does

There is a huge difference between delivering “custom” and “customization”. Custom is when every client solution requires reinventing the wheel. You start at zero every time. This is why 5-10 *custom* clients are often 40-80 hours of work each week.

Customization is when the solution is already finished and you are just personalizing little details to fit your newest client. When you do *customization*, you start each job 90% finished before you even get the next client. This allows your solution to scale much easier. It sets the foundation for you to do work once and then copy and paste to keep getting paid.

Often people say, “The agency model isn't scalable" and they are wrong. Sometimes agencies begin with 3-7 happy clients and everything runs great. Then that number suddenly changes to 15-30 and shit hits the fan. Employees are being hired who just don't have the owner's drive, ambition, and work ethic. Clients usually leave unhappy. Promises go unmet. If it's happened to you, you'd probably conclude the same thing. “It’s not scalable”.

When McDonald's first started, they only offered hamburgers. When Amazon first started, they only offered books. The real reason most agencies can't scale is because every client is custom. They are McDonald's trying to sell a burger to one client, a chicken sandwich to another, french fries to another, a pizza delivery deal with another, catering to another, the awful filet-o-fish monstrosity to another, and they end up creating 18 other different items that weren't on the original menu.

They are Amazon trying to figure out the logistics of shipping TV's, storing pasta, gift ideas, chocolates, saunas, gardening tools, and toilet paper when the toilet paper zombies are buying it up.

That's called "custom" and it works great with a handful of clients. But baby, it doesn't scale unless you have big fat margins to hire the best help. Even then, it's unnecessarily hard.

Customization is a smarter way. Want your burger cut in half? Extra pickles? No ketchup? Hold the onions? Extra lettuce? Sure we can *customize* your burger. However, the client can only get one thing. They can get the basic burger. It's the *same proven recipe* every time. There is one winning recipe. We don't fuck with a proven classic. We don't reinvent the wheel with each new client.

Custom does not scale well. It's a recipe to be stretched thin, feeling pulled in 1000 different directions, spending all day staring at a screen, and getting a lot of unhappy emails, texts, and phone calls. Plus every niche has its own lingo and you have to relearn the terms over and over. Customization can take you a long, long way before you hit speed bumps again. Clients will rave about how great your burgers are and bring their friends to try them. It's a recipe to sell a lot of hamburgers with relative ease.

If you've never experienced this before, this is why 50 or more "customization" clients can be serviced in under 10 hours per week. We aren't reinventing the wheel. We're just cranking out the same basic burger.

Here's the most interesting part. It's actually *better for the clients*. Clients don't actually want custom solutions. They just want *results*. Customization also creates more consistent client results. There are less moving pieces to figure out.

Think Smaller, More Focused, Not Bigger

People often resist choosing a niche because they think it limits their potential client base and hence, their earning potential. In reality, the opposite is true. You earn more because you *create more value*.

Another reason people fear picking a niche? They fear is they pick the wrong one, they will never be able to make money. Every niche is a spectrum. There are rich people and broke people in every niche. Picking a niche is closer to choosing an ice cream flavor than a spouse. It should be a 48 hour decision. Not a try to get it perfect for 9 months. Almost every niche is viable. You're going to be talking to the rich people within the industry and not just "any dentist / plumber / coach / ecommerce store with a credit card".

Sometimes people don't choose a niche because they think they will be stuck with their niche forever. Not true. You can steer the ship after it's moving. If you get into a niche and find out it's not for you, it's okay to refine. Refining is part of the process.

Myth busted: You are not locked into a niche forever.

In a typical lifestyle marketing agency, you're going to max out around 100 clients. In fact, to hit their income goals, most people just need 10-30 good clients. Instead of trying to cast as wide a net as possible, we want to focus like a laser on those 10+ people. We want to choose our 100 clients very carefully.

This means going deeper than just a surface level niche. It is even more accurate to say that we want to choose a profitable *sub-niche*. A niche within a niche. Specifically, we want a sub-niche with the *highest value* clients and customers. Usually that sub-niche is an untapped blue ocean. A place where your service can be its own category of one. Whether you are choosing a niche for the first time or pivoting to a new niche, it's important to nail down your sub-niche. Most times people think about scale too late.

Designing For Leverage And Scale

A sub-niche helps you design your agency with scale and leverage in mind. In other words, more in the bank account with less effort and happier clients to boot.

Most people think about scale too late. They wait until after they have a few clients. By then, they deliver time-consuming, low-paying, *custom* work. That's already too late.

Custom results in having to constantly reinvent the wheel with each new client. That's how in 2008, I ended up working 12-16 hour days trying to keep up with 9 clients. Here's a better formula.

1 Client. 1 Problem. 1 Solution. 1 Deliverable.

It's way easier to create something for one client and reuse the *same exact solution* for client 2,3,4, etc. Here's the interesting part It's actually more valuable to the client. We often think our value is in *doing*, but it's actually in the *results* of our doing.

For example, if a client wanted a new website, what's more valuable to them? A new custom programmed WordPress website that takes 6 months to get up and running and requires 27 back and forth communications? Or reusing a site that works elsewhere already and just *customizing* their content so the site is up and running by the end of the day? Speed matters. With the existing website asset, we start every client 90% finished before we begin.

Our clients don't want *custom* as much as we think. They want the *results*. We want to *customize* our solution for <u>fast results</u>. That's it. In the process, we create assets that can be used again and again.

Marketing *assets* are tools that can be used again and again. They become more valuable with each use.

Every time we create a campaign, tool, or strategy, we are creating marketing *assets*. Assets are tools that can be used again and again. Let's say an agency owner figures out how to generate leads for a plumber using Google Ads. After a few months, they have a working process dialed in. That's when most agency owners go looking for a new client; another dentist, ecommerce store, online coach, etc. We want to reuse assets. There are only 3126 other counties where another plumber could benefit from that exact same system and solution. The marketing asset becomes more valuable each time we use it. Don't find more clients. Find more people who can use the same assets.

That's how we scale with less effort. *Our assets do the work*. We are *leasing assets* to clients, not providing a service. Choosing a sub-niche allows us to think more strategically about the work that we do. It allows us to reuse our assets. After all, what works for 1 dentist will probably work for another dentist. Ya dig?

This is why your niche matters. You create more results but do less. More beach, less laptop.

The opposite is also true. Without a niche, we work long hours, often have no room to take on more clients, even though we want the additional money. Usually we work too hard for too little reward. Reinventing the wheel and creating a new solution for each and every client. That's called a self-made prison.

(Ask me how I know?) That's why *any niche* is better than *no niche*. We choose our niche so that we can have leverage and scale. Again, this is choosing an ice cream flavor and not a spouse. The worst niche is no niche. Any niche will do. Just pick one.

Identifying A High Value Sub-Niche

There are 3-levels to discovering a highly profitable sub-niche.

<u>Level 1</u>: We choose a broad type of business.

<u>Level 2</u>: We narrow it to an industry within.

<u>Level 3</u>: We identify the highest value clients within the industry and specialize in them.

Level 1: Choose a type of business.

In essence, there are really only 4 types of business. Which one most appeals to you and why?

1. **Ecommerce Business**: Sells physical products over the internet.

2. **Local Business**: Operates in the real world, typically in a local geographic area.

3. **Expertise Business**: A business like coaching, consulting, courses, trainings, and so on.

4. **SAAS Business:** A software business that sells some kind of digital software package to their end client.

Level 2: Narrow down to an industry within.

We need to further refine. The narrower the better. It is better to choose a cosmetic dentist than just any local business. It is better to choose online supplement companies than just any e-commerce business. It is better to choose online weight loss coaches with a mastermind program than any online coach. The worst mistake people make when selecting a niche is simply not choosing one. You can adjust later. The second big mistake is still being overly general. Amazon and McDonald's started small and expanded their offerings later. Remember, we're after a maximum of 100 clients. It's a lot easier to be a big fish in a small pond. Think *smaller* and more *focused*.

Level 3: $100 Bill vs 5¢ Clients

In every niche, there is a *value spectrum*. A lot of agencies tend to treat "leads" as if they are all equal to clients. In reality, many "leads" have totally different value.

Nickel Clients: The lowest value volume work.

$100 Bill Clients: The highest value specialty work.

Examples of 5¢ and $100 bill clients:

<u>Roofer</u>: A roofer may get paid a few hundred dollars to repair a leak (5¢). They could earn $250,000+ for an average big commercial job ($100).

<u>Online business coach</u>: They might sell a $27 course (5¢) and $40,000 year long mastermind ($100).

<u>Digital supplement brand</u>: They might sell a $27 bottle of weight loss pills (5¢) and $99/month recurring supplement package ($100).

All things being equal, we want to help our clients generate $100 bills. This also helps our clients earn more with less effort and makes our service more *valuable*. It gives us a lot of room to be wrong. If we're selling our client's $80k service, we can afford to spend $10k on ads to go get one client and still generate a huge return. It doesn't work like that for nickel clients. Nickels have tight margins and little wiggle room. Often the owner doesn't turn a profit after selling nickel services. There is general volume in nickels but no margins. Here's how we create a unique, highly valuable $100 sub-niche.

Step 1: Pick a broad niche. Narrow it down to an industry.

Step 2: Specialize in the highest value "$100" clients.

Step 3: Create a unique system to produce their highest value $100 clients.

This means, it is not enough to simply have a deliverable like SEO, Facebook ads, web design, Adwords, copy, TikTok, YouTube, chatbots, GHL SAAS, etc. Your potential client sees those services like a hammer. You know who loves buying hammers? Nobody. Ain't nobody wants a hammer just because.

Your client is thinking about something totally different: their project. What they're trying to *build*. Why do people buy hammers?

- They might want a newly remodelled kitchen.
- They might want a fence to keep their nosy neighbor out.
- He might want a new birdhouse that lights up his daughter's face.

Too many folks make getting clients harder by shouting stuff that sounds a lot like...

- "#1 Hammer Company."
- "Hello sir, do you need low cost hammers from India?"

- "Guaranteed 2x ROAS on our hammers."
- "We build WordPress fast loading hammers."
- "We get you to the top of the hammer shelf."
- "Hammers for [insert niche]."
- And so on. You get the idea.

Selling the hammer is a lot like selling a vacation by talking about the flight to get there. Nobody really wants the flight. They want the palm trees, the beach, the sun shining through their hair, scantily-clad bikini babes, and cold beer on a Tuesday afternoon. They want some well-needed time away from the office, pointless meetings, office politics, asshole bosses, spreadsheets, daily grind, and traffic.

Now back to your marketing service. Are you currently niched in selling a hammer? Or are you selling the finished birdhouse complete with a smiling daughter? Are you selling the dream vacation? Or are you selling the long 12-hour flight to get there?

That means our agency is *not about a delivery vehicle* – SEO, FB ads, Adwords, Web Design, copy, funnels, etc. It is not enough to "do" SEO. We have to aim our SEO towards a high value $100 bill client that our client desires. It is not enough to do web design. We have to create designs that help our client to bring their $100 bill clients. There is a big difference between "we do web design" and "we help NY Times best-selling authors to create eye-catching covers and sell their book online" with a catchy website. While they are both designers, the former might struggle to earn $100 per design and the latter will get no push back at $10,000 and up. What's your $100 sub-niche?

We don't sell *services*. We sell *outcomes*.

Our agency is about creating a high value $100 bill *outcome* for someone specific.

If you haven't already decided, let's choose your high value $100 bill sub-niche.

Before we begin, grab a pen and paper. We're going to be asking some important questions. It's important to get it all out of your head and on paper for you to evaluate. Before we start writing, let's discuss some important ideas about choosing a niche.

Most people settle for the types of clients who show up with a credit card in hand. We don't ever want to "settle" in life, period. By choosing our $100 bill sub-niche, *we are selecting the types of clients that we most want to work with*.

We can go where they hang out, make offers that appeal to only those people, and work with the types of clients that are the right fit for us.

We choose our clients. Not the other way around.

We can't choose a niche by just sitting on the sidelines thinking about it. We have to choose someone, work with a few clients, and see if it's what we enjoy doing. What would you enjoy? Be you. Unapologetically you. It will bring the right people.

***Who* is the right fit for me?**

The first person your niche should work for is you. Here's a big, big, big mistake most people make when choosing a niche.

"Which niche has money?"

Hint. *Every niche has money*. Every niche has broke people too. They chase who they believe will pay them, instead of what would make them happy. The truth is every niche has money. There are broke roofers and $100,000,000 roofing companies. There are broke lawyers and $500,000,000 law firms. There are different offerings too. There are nickels and $100 bills in every niche. Someone, somewhere is making money in that niche or there wouldn't be a niche in the first place. Someone has money and someone is broke in every niche and there is always a spectrum in between. Every single niche is like that. There is a money and success *spectrum* in every niche.

Your niche is about your gifts. Not every niche has your drive, your passion, and your enjoyment. So let's put some *fun* into the game.

A fun business is easy to grow. An unfun business will make you consider blowing it up every step of the way.

***Fun* is a crucial part of the niche equation.**

Fun, easy, high-paying clients are a great beginning point. Understand, this is not a theoretical exercise. The more you can think about *real people* with *real names* in *real situations*, the better. Your past experience gives clues.

If you don't have clients yet, imagine them. You have worked with people before, even if only as an employee. Who would be really cool for you to work with? Choose a narrow band of people. Be a rifle, not a shotgun. Who will your business be about now? *Specificity prints cash*. Get *clear* on what you really want and why.

Pro tip: Your experience is someone else's benefit. Often the best people are like you were in the past or in industries you already have worked, even if it's just as an employee. Your past experience leaves clues.

Any niche is better than not deciding. We can always refine later. *Decide now*. Steer later.

If you would like some helping deciding on a niche, try using this AI tool.

https://www.beyondagencyprofits.com/niche

Once you have your niche, the next place to begin is researching their problems. Here's the cheat code to do this in 20 minutes.

https://www.beyondagencyprofits.com/cheatcode

Be different on purpose.

Differentiation is often the simple small stuff. I've seen law firms stand out by sending a text message instead of a phone call. We're looking for *small desirable differences*. You don't need to reinvent the iPhone or launch our species into outer space. We're looking for *small and meaningful differences*.

Also, one of my mentors says, "I like to do things once that I get paid for over and over." We want to create reusable solutions so we begin 90% finished before the second client hires us. The rich work for control and ownership of assets. They don't work for clients.

If you've ever solved a problem for anyone, little or big, (and you have), then chances are that you have already created some tools and assets. It's likely you only got paid once for those assets. Most people just overlook reusing the asset they just created.

Getting To The First $10k

If you’re reading this and picking your niche and trying to get to your first $5k-$10k month, understand this. Most people start in the wrong starting place. "Maybe I could sell _________."

- Should you do a GHL SAAS?
- Should you do FB ads?
- Should you do web design and SEO?
- Should you do database reactivation to get your foot in the door?
- Oh but chatbots are hot.

No. No. No. No. You're starting with you and your deliverable. Don't do that shit. Start with a client. Choose *who* you're going to do it for. Then research. It’s not about you. It’s about them and what they want. Join their communities and really *listen*. Start with their problems. What are they trying to do? What stops them? What do they not like about those options? Then build a deliverable that *serves them*. What's the best tool to actually help them solve that problem? A real solution. Build that.

If you skip this step, you're only going to build "me too" offers. Which are brutally hard to sell. I know it's tempting to follow that other guru's copy and paste system. But listen brochacho/sista, you're going to end up being the 1001st person trying to sell the same exact thing in the same exact way to the same exact people. That's the recipe for a long difficult grind. It's hard because this entrepreneurship doesn't always have a step by step playbook. But I promise if you start with people you want to help and problems they're trying to solve, you're going to be in really, really good shape. Start with who. Start with their problems.

1. Decide who you're going to do it for.
2. Find out what they want.
3. Figure out what deliverables will get them that result and build the deliverables.
4. Go prospect like your life depends on it.

Want to see how this process works? Over the last 7 years, here’s the question I have been asked most.

“If you were me starting over and wanted to get to $10k per month as fast as possible, what would you do?”

I decided to do it and document the process. We got to $15.6k/month in 26 days. Even if you’re well past those numbers, it probably wouldn’t hurt to add an extra $15k recurring. You can follow along with this case study here.

https://www.beyondagencyprofits.com/90day

Long term, winning the agency game is not just having a “better message” or surface level “better marketing”. Long term, your business needs to *genuinely create more value*. Usually value is more about what you *remove* from the process that saves clients time, energy, and effort. We create an agency with a strong and small but meaningful *why*.

Reflect a little. Clarity is the most important step. Get clear. Then steer the ship.

Chapter 4: Solving Sales Woes Forever With Irresistible Offers

What's the *one thing* that makes it really easy for clients to give you money?

Contrary to popular belief, it is *not* about becoming better at *selling*. You don't need a 247-step shiny, objection-handling sequence. You don't need the 1-2-3 Whizzbamo closing technique (patent pending). You don't need to twist anyone's arm. You don't need to pressure people to do what you want them to do. In fact, you don't need to coerce anyone at all.

"It's about the offer, stupid."
- Marketing legend Dan Kennedy

The most important thing is to get your *offer* really, really dialed in. You must have something totally irresistible; something that your market desperately wants and needs.

It must be something that you can uniquely provide for them. It should be unique to you and your agency. Most of all, it should appeal to the specific type of client you most want to work with. It must be sexy to the right person and irrelevant to all the wrong ones.

After all, what’s a “funnel” but a well-crafted way to deliver an offer? What’s a website but an automated tool to deliver your offer? What’s a Facebook ad but another offer? What is a “sales call” but 60 minutes of talking to make an offer?

If you can’t sell your offer in a few short sentences, why would all the bells and whistles make an unsexy offer sexy? It can’t. So before we add complexity to our offer with funnels and websites, shouldn’t we get the most important piece, right?

Here’s the kicker. Most agencies have a shitty “me too” offer. If you could sum up their offer, it looks something like this.

Typical agency offer: “Give me thousands of dollars every month and I'll try and generate some leads for you. You will have to close those leads yourself. I will generate leads by running some ads and/or doing some SEO for you. Eventually after a few months, hopefully you'll make some money. No guarantees though.”

In summary, invest lots of money, wait a while, and then no guarantee it will even work. Now, when you put it like that, see anything wrong with that picture? See how that offer would be totally *resistible*? See how it might even turn most people off? See how that offer means sales will be paddling upstream? See why that offer needs a massive amount of selling and coercing? See why that offer needs a lot of booked appointments and appointment setters just to make just a few sales?

When we have a hard to sell offer, it gets even worse. It’s asking a complete stranger to invest thousands of dollars in an unproven result with a long term commitment. In the end, after all the time and money invested there’s no guarantee that it's actually going to work for them. Plus even if we do a great job and generate truckloads of red hot leads, what if they’re like most businesses? What if they have no idea how to convert them?

Plus, there are a million different competitors. Isn’t everybody and their cousin/brother/uncle now a “digital marketing expert”? It’s a recipe for disaster. It creates an unnecessary steep uphill climb.

The Dreaded Typical Agency Trap

If we run a typical agency with a typical me too offer, it puts us behind the 8-ball. A lame offer puts us in very shark-infested waters. Escaping that means having an offer that is truly unique and more valuable to our clients. Our marketing success begins and ends with the *offer*. We can’t be another “me too” agency.

Example me too agency offer: “You do Facebook ads? Well gee golly gosh darn it, me too!”

A Great Offer Changes The Landscape

If you've ever sent out cold emails, did outreach on Linked In, ran Facebook ads, put a video on TikTok or YouTube, answered questions in groups, and it didn't translate to sales, it was probably your offer.

The right offer puts you in the driver's seat. You end up with more people wanting you than you can handle. You become *the selector*. As the selector, you pick and choose the clients you want. Generally, that means clients that are easy to help, fun to work with, and stay happy with you for a very, very long time. The right clients feel more like "friends with money".

Here's What Pimping An Offer Looks Like...

How much would you pay for a steak dinner? $20-40 maybe? What if that steak was made by Gordon Ramsay? What if you got to eat it with your celebrity crush? What if you got to eat it on top of the Empire State Building? What if there was also a banquet in your honor? What if all your favorite people came to honor you?

Does it make sense that a steak dinner, prepared by Gordon Ramsay, on top of the Empire State Building, with your celebrity crush, at a banquet in your honor, is infinitely more irresistible than your average $30 steak dinner? How much do you think someone would pay for *that* steak?

Why is that important? Because we're still talking about a steak dinner. It is essentially the same basic product and service. The offer just got sexier. You don’t need to *deliver* something totally different. It’s just the *packaging* that needs some sizzle to it. It’s the frosting, not a brand new cupcake.

Let’s get radically outside of the box. Sometimes dramatically improving your offer takes just a small tweak or two. The stronger the offer we make, the easier we get an instantaneous “yes”. The easier and easier we get a “yes”, the more we are the one in power.

We want to have an offer so easy to say 'yes' to that *you'd be stupid not to*. Most agencies have hard to sell offers. Hard to sell offers are how we end up in proposal hell, chasing someone who doesn't return our emails or phone calls. That’s when we say, "Hey I’m just messaging you to see if you have reviewed my proposal yet."

Firstly, here are the 4 big offer mistakes most agencies make.

1. The offer is *not specific enough*.

2. The offer is *too big and risky* and feels too much like marrying a stranger.

3. The offer tries to *replace* a service they already have.

4. The offer is *too similar* to what everyone else is offering in the marketplace.

What works? The opposite of what most people do.

Step 1: It should be crystal clear who it's for and offer a *specific crystal clear outcome*.

Bad: Business owners, I can increase your profits with Google Ads.

Good: If you have a roofing company with at least 2 crews, we can get full roofing install leads for $40 each. (I don't know actual prices in this niche, just giving an example of *specificity*.)

Specificity prints cash. The best specificity is a specific client and a specific $100 bill as the outcome. This is where 99% of agency owners are selling the plane ride/vehicle and their hammer. They are selling services and not outcomes. You want to describe what is going to *get done*. Most agency owners are describing what they are *doing*. Doing vs getting done is the difference between "we'll run Facebook ads for you" (*doing*) and "we'll run Facebook ads to get you trucking accident cases for $1000/signed case" (*gets done*). Clients care about what you're going to *get done* for them. We describe *outcomes*, not services or processes.

Step 2: It should be low risk and feel like "hey let's have a casual coffee date together".

A well-orchestrated first date offer automatically leads into the marriage you're selling. You will sell a lot more marriages by offering a first date first. A great first date sells the marriage automatically. *Business is relationships*.

Bad: Try my 12-month SEO package to increase your rankings.

Good: Let's run a 3-day database reactivation campaign for your chiropractic firm and get your first adjustment patient by Friday.

A *small decision* gets an easy "yes". What *small and meaningful result* can you produce *quickly* for the right client? It doesn’t have to be the whole big result, just a smaller bit-sized version. If you only had 24 hours to produce a result, what would you do?

First dates can be longer if need be. It’s just a good thought exercise to start small. I’ve run first dates as long as 90 days. Some are just a few days. Either way, focus on generating a meaningful result quickly. It’s about *shrinking the size of the ask*. You don’t ask the pretty girl to marry you and meet your parents if she doesn’t know you. You ask her out for one date and work your way up to marriage.

First dates also help you determine if a client is worth working with long term. People automatically assume all money is good money. Some clients are crazy. A first date screens early on for potentially bigger issues like bad attitudes, micromanagers, peeps who don’t pay on time, or just simply someone you can’t help. First dates are an easier “yes” and it helps you feel a client out.

Step 3: The offer should *add on* to their business and not try to replace an existing service.

As an easy litmus test, do they have to fire or replace someone to claim your offer? If so, you're probably going to have a hard time selling that offer. It's why selling SEO (replacement offer) is hard but selling messenger bots (add on offer) is easier. Think dessert (complimentary) instead of new dinner (replacement). Can you reposition your offer to add on instead of replace?

Bad: We run 2x ROAS Facebook ads. Try us and we'll beat your existing ads or agency.

Good: If you’re a personal injury lawyer, we have a campaign for motorcycle cases that *adds on* to your existing Facebook ads strategy. Get your first package of motorcycle case leads for just $400 for 10 leads.

Figure out how you can make your offer *add on* to what they’ve already got going on. Don’t make them have to fire someone to hire you.

Step 4: The offer should be a “*new and exciting way out*” and not trigger the “I’ve heard that before” response.

Travis Sago says, “As long as you sell to humans, *new and exciting* will outsell I’ve heard that before.” If you can easily Google your offer and shop for 100+ competitors, you need a new offer. Legendary copy writer Eugene Schwartz calls this a “unique mechanism”.

A) What are people in your niche sick and tired of doing every day?
B) What does your solution look like when it's done?
C) What's different and desirable for them about your methodology?

The basic message formula is "We'll bring you from [A] to [B] using [C]".

Bad: We do SEO for plastic surgeons.

Good: If you’re a plastic surgeon, we can bring you mommy makeover patients by building and ranking your own mommy makeover mini-site.

Let's talk fixing broken offers.

A lot of people read Hormozi's $100m Offers and translated it to mean "take something people don't want and strap an over the top guarantee to it". That may work. But we've found it's better to articulate an outcome your client actually wants. And be *specific*. Because specificity prints cash.

For example, one of our WolfPack mastermind members was working with personal injury attorneys. Originally his offer was "we'll get you quality leads from Facebook ads". Now, we could strap an over the top guarantee to it. "We'll get you quality leads from Facebook ads or we'll pay you $1000 guaranteed."

But here's what we did instead. We got more specific on the desirable outcome. "Tell me more about what makes a quality lead?"

"Well a few things I guess. They were in a motor vehicle accident."

"What else?"

"Well they don't yet have an attorney. They have insurance. They weren't at fault for the accident. It's within the statute of limitations so they can still file a lawsuit."

"Great. And what's a typical result you can get for a client?"

"Usually we can get leads for like $100. They'll close 1 in 4 or 5 of them."

Here's the new offer. "Personal Injury Attorneys: We'll get you motor vehicle accident leads not already represented, not at fault, have insurance, and within SOL... for under $500 per signed case."

Instead of the generic "quality leads", we were specific about an *outcome* our ideal client wants. The same applies in your niche. If your offer isn't working, it's probably because you're NOT clear on the outcome your client wants.

FYI the outcome comes from them and not you. It's not because the offer needs an over the top guarantee. It's because it needs specifics about what a client actually wants.

3 Offers To Sell Anything

Coffee date: Usually free, a small first offer that creates a small but meaningful result for a client in 10-15 minutes. It shows you can help them by actually helping them.

First date: A paid working arrangement where you work together in a small capacity, to determine is (a) you can actually help them and (b) if it makes sense to continue working together further.

Marriage: Your ongoing “let’s work together forever” or at least until you cancel arrangement. This is typically the offer most agencies are the clearest on. They generally know what they want clients to pay them every month for.

Here’s the secret of the 3 offers.

You design your coffee date so it leads into your first date and also so your first date leads into marriage seamlessly.

For example, we have one mastermind member who sells a software made in GoHighLevel to generate Google reviews. At first, he was very clear about his marriage. He wanted people to pay him every month to generate Google reviews. But selling his marriage to strangers was hard to sell. So we created a first date offer. The first date? Let's run a single campaign and generate 10-30 Google reviews from your existing customer list in the next 14 days. This was a much smaller commitment. Then we designed a coffee date. His coffee date? Here's my 1 sentence script you can text a past client to generate a Google review. Now instead of messaging a stranger and trying to get him to buy his marriage, he just asks if they'd like a free script to generate a review. If they like it, they naturally want more. Without him having to push sales on people who don't want them.

This is a Costco secret. Costco doesn't try to sell you on the idea of buying 8 boxes of pizza every week. They start with a small free sample (coffee date). Before you know it, you're buying your first box (first date). Then you're buying 8 boxes every week (marriage). It's a lot easier to open the door with a small coffee date that has escalation built in mind. You want to design your coffee date to lead into the first date to lead into marriage. Then to sell marriage, just give away your coffee value add.

Does this mean you can't sell marriage to strangers? Of course not. Just that if you do, you will need more proof, have longer sales cycles, and you won't be able to tell which clients are crazy before you work with them. The first date is just as much to protect you as it is to sell more easily to clients. If you don't like a client or their attitude, you just don't offer a second date. This works because the biggest obstacle to a sale is always trust. This builds trust by demonstrating you can help them by actually helping them.

Tiers of Value – From Least Valuable To Most Valuable

Remember, we want our marriage offer to actually me more valuable. Not just to have better words and messaging. Here are tiers of value, starting with the least valuable.

Services: You have a regular monthly service, irrespective of whether or not it delivers tangible results.

Tools: You have a tool or system that clients buy into, irrespective of whether or not it delivers tangible results.

Leads: You generate leads AKA sales opportunities for clients, including calls and/or form fills.

Qualified Leads: You generate sales opportunities for clients, and do some level of prescreening or qualifying for them to make sure they are a fit.

Specific Leads: You generate leads of a specific desirable type, often their hundred dollar bill.

Specific Qualified Leads: You generate leads of a specific desirable type, often their hundred dollar bill and you do additional prescreening or qualifying steps.

In Person Meetings: You generate a lead for a client and you schedule that lead to have a face to face meeting with your client.

In Person Meetings With Reminders: You generate a lead for a client, you schedule the face to face meeting for them, and you have additional reminders to ensure the prospect shows up for their meeting.

Qualified In Person Meetings With Reminders: You generate a lead for a client, you prescreen or qualify them first, generate a face to face meeting, and have reminders to make sure the qualified prospect shows up.

Specific In Person Meetings: You generate a specific high value lead for a client, often a hundred dollar bill prospect, and you get your client a face to face meeting with a prospect.

Qualified Specific In Person Meetings With Reminders: You generate a specific high value lead for a client, often a hundred dollar bill, you prescreen and qualify them, and you add reminds so the prospect shows up.

Sales: You just sell their product or service for them.

$100 Bill Sales: You sell their most expensive thing for them.

Generally speaking, if you want your offer to be more valuable, *be as close to the sale as possible*. Because some niches have variable pricing, you may not be able to directly sell your clients thing. The closest you can get is with a qualified face-to-face booking. However, the ultimate offer is “we’ll bring you sales of your most expensive thing”. Try and get as close to that as you can.

For example, my friend Tony T has a 6 month waiting list for clients. His offer is we’ll sell your $10k coaching program for you. Clients hand over an email list and he hands them back new clients. It’s selling no effort money at a discount.

Lana serves yoga studio owners. There are generally 2 offers that are common in the industry. Firstly, many studios offer to try a free class. Then after someone tries a free class, they try to sell a monthly membership. The problem was that she was generating "leads" and yoga studio owners couldn't even close free classes. They wouldn't pick up the phone. Didn't call people back. Couldn't answer basic questions. Sometimes didn't even know their own address. She decided to just offer the free class right on a website. Then eventually she decided to sell the monthly membership right on the website. She hasn't heard "the leads are bad" in years. Why? Because she's bringing sales and not just "opportunities" her clients would probably squander anyway.

Pricing Your Premium Offer

What determines a premium price?

- NOT how much *time* it takes to deliver.
- NOT how much *energy* is required.
- NOT about "*hard work*" or how many hours of "service" they get.
- NOT based on what "*competition*" *charges*.

Here is what DOES determine pricing.

- The total *value* of money, time, energy saved or made.
- The *size of the problem* solved.

- The *cost* of not solving the problem.
- The *uniqueness* of offer.
- Who takes on the *risk*.
  (You = more $$$, them = less $$$)
- The more it comes to the client *without effort*, the more valuable.
- The *faster* it works, the more valuable.

Mantra: Easier, faster, better, with less mistakes.

The Double Who Of Pricing

<u>Who #1: Who is your client?</u>

Pricing and value are interchangeable. You earn more by bringing more value to the table. What most people don't realize is that *value is fluid*. Value depends a great deal on *who* you offer your service to. For example, let's say we offer SEO to lawyers. The same service in the same niche but delivered to a totally different person can have totally different pricing.

Typical Stage 1 Solo Lawyer
$400-2000/month SEO

Typical stage 4 or 5 TV Lawyer
$10k-20k/month SEO

A solo lawyer might only afford $1000/month for SEO. A bigger TV lawyer with a staff of 100 may not take an SEO solution seriously if it's not at least $10k/month. Did the SEO service get better? No.

Your pricing is fluid based on who you offer your services to. One way to increase your prices is simply to give yourself permission to *go after bigger clients*. I've helped a few people in our mastermind get to $100k/month and beyond simply by just going after bigger deals. It's not uncommon to take a $2k/month service and turn it into a $10k/month service because it's re-positioned for a bigger *who* with a *bigger problem*.

Who #2: Who is your client's client?

This is a sophisticated way to say that if you bring your clients *$100 bill clients*, your offer will be a lot more valuable than if you bring volume and *nickels*. Value, and hence pricing, is largely a function of *who you do it for* and *who you bring them*. The easiest way to raise your prices is to go after a bigger who and bring them a bigger who. You can do this without changing your service one iota. It's more mindset and being bold than anything.

Explaining Premium Prices

Conventional wisdom says that you never mention your price until the very end of a sales call.

Conventional wisdom is always wrong. Most people hide from their price because people see their offers as a *commodity*. They can be easily shopped around and found for cheaper. If you've followed this chapter, your offers will be far more *unique* and *valuable*. Here is how to present a premium price any time, any place, without any resistance.

<u>The I-V-Q Formula</u>

1. Investment
2. Value
3. Qualify

When I was a young kid, we had a handicapped neighbor named Richard. Richard was mostly confined in a motorized wheelchair, though he could walk for short periods of time. He used to try and mow his own lawn and you could see the struggle. That's when my mom went full Colonel and ordered in my brother and I to finish the lawn for him. Richard always tried to pay us $20. My mom always refused. She always treated the money exchange like it was a "*take*".

Most agencies present their price like a "take" and therefore they cannot just openly state their price. Every price sounds like a take without any *context*. The truth is that a money exchange is neither a give or a take. It depends on what value is being exchanged and the conditions. That's why $5000 would be extortion for a cup of coffee but a fantastic deal for a new Porsche. It's not the money. It's what the *value* you get in exchange for the money.

Most "sales calls" are just potential clients who are 3 out of 10 on the idea of working together trying to find out the price. Here is how we present the price using the I-V-Q formula so the value is clearly understood.

1. State the investment.

   "The investment is __________."

2. Describe the value and outcome received.

   "For that you will get _________."

3. Qualify who would be a good fit.

   "Works if you are ________."

Compare the old way and the new way.

<u>Old way</u>: "Our service costs $1000/month." (Take)

<u>New way</u>: "The *investment* is $1000/month. For that *you will get* about 30-50 qualified personal training appointments each month. *If you close just 1 out of 10* of

those people on the phone then that's 3-4 clients valued at $2-4k clients." (Give)

This formula is how we can present a $100,000 offer and have it not be viewed as expensive. For example, "The investment for our services is $100,000. For that we will use our media buying expertise to get remnant ads that typically save you $1,000,000 or more per year in TV media costs. If you keep running ads at your current budget, you will save over $1,000,000 this year alone."

IVQ contextualizes price and value together. This contrasts the money with the value received and specifies what conditions must be met for the exchange to be successful.

How To Price Your First Date Offer

After 100 years of direct mail testing, do you know what worked best to go from single sale to continuity? The same exact price. That meant if they sold a $79 newsletter, $79/month had the highest take rate. This is how cars and insurance have been sold forever. It's all about the monthly payment.

Ideally, we want to price our first dates, so they lead into continuity. If you have a $2k/month marriage offer and your first date takes a week to deliver, then you could price the first date at $500-700. It's like, "Well you already paid me $600 for a week once and we produced this result. If you want, I can do this result for you every week. Let's just keep going at $600/week. Matter of fact, that works out to $2400/month or so. I can just give you a discount and make it an even $2k/month. How does that sound?"

Basically, if your goal is a monthly retainer, price a first date so what they pay you once is what they're going to keep paying you.

Here is another easy way to price a first date. Price it for the cost of a *single unit of result*. It could be $300 per booked appointment or $100 for a qualified phone call. You often disguise more expensive $10,000/month and up packages by simply offering them at a per-unit-of-result price. If you can bring a client 100 leads per month, then selling one lead for $70 is a lot easier to say “yes” to than a $7k/month retainer. They’ll pay $70 for a single lead all day every day. That’s valuable to them. Same service, different packaging. Like Dan Kennedy says, “It’s about the offer stupid.”

“Create Your Own *Mini Monopoly*.”
-Travis Sago

One of the big agency success secrets is creating a "mini monopoly". After building 3+ agencies to 100 clients since 2007, here's what we figured out. When your service seems like something a client can get anywhere, sales are difficult to get. You chase a lot. Lotsa and lotsa prospecting. Expensive ads. Proposals. Phone calls. Sometimes a few sales calls. No shows. All that kinda jazz. Chase til you're blue in the face. It’s pushing a boulder uphill. Grind. Grind. Grind.

When you have a *mini monopoly*, there is only one choice. You. Your company. It makes the chase a lot easier. It's like being the prom queen. You are in demand. So, how do you create your own mini monopoly?

Let me give you an example of how we did this in my first agency. Our niche for SEO was plastic surgeons. Like most niches, it's competitive. Cutthroat even. Within this niche, there are tons of customers across the spectrum. There were nickels and $100 bills. That's true in every niche, FYI. Yours too.

I can't stress this next part enough. Not all clients are created equal. The nickel clients were Botox injections and boob jobs. Those clients are generally low profit margin, sometimes even zero margins. When we brought these leads, our clients worked to the bone, doing long hours for low profitability.

Then there were the "$100 Bill Clients". These are the high-end specialty work. Face lifts. Nose jobs. Mommy makeovers. Most of those services started at $25k and up. Some went for much higher.

Remember, there is an equivalent nickel service and $100 bill service in your niche as well. Your job is to recognize the *value spectrum* that already exists. Most agencies treat nickels and hundred dollar bill leads all the same. They're not. A roofer doesn't value a $100 leak fix as highly as a $250,000 commercial job and neither should you.

Here's what we did. We created a system to bring more of their $100 bill clients. We created a mini website around their feature $100 bill service. Some surgeons wanted a specialty face lift, others a mommy makeover, and others wanted a nose job website. Different $100 bills for different folks. Sometimes they wanted one of each. These were their "$100 bill clients". The leads they valued the most.

Then we optimized their new $100 bill website around the $100 bill Google searches. The face lift site was optimized for the face lift searches. The mommy makeover site for the mommy makeover keywords. You get the idea.

Remember, our clients could get web design and SEO anywhere. They literally get pitched SEO in their inbox 100+ times per week, every week! Yet, we were the only place they could get a mini website designed and optimized to bring in their highest value, most profitable $100 bill work. In other words, a mini-monopoly. Of course, anybody could do that in any niche, but nobody does it.

This principle is equally true if you do web design, Facebook ads, Adwords, funnels, sales copy, etc. You're not selling your service. You're selling the *result* of your service. Selling SEO was a bloody, shark infested red ocean. Selling $100 bill solutions was a unique blue ocean void of competition. Build your own *unique methodology* around your $100 bill client, and you'll have a *high value mini-monopoly*. That’s when you provide a *high value result* and they can't shop around. You want to be in your own category of one.

Also, if you've gotten value out of this book so far, click here to leave a review.

https://www.beyondagencyprofits.com/review/

Chapter 5: Getting Your Offer In Front Of Buyers

You've got a cool offer. Now what? How do we actually get that offer in front of people? How do we get them to buy it consistently? How can we be strategic?

The Less But Better Approach To Agency Lead Gen

What if all that was needed to get 3 clients was just 5 messages? Because that's exactly what we do. I've taught this approach to hundreds of agency owners, some who used to send thousands of messages per day. Once they switched to "less but better" lead gen, they could focus on less approaches done better. The Book *Essentialism by Greg McKeown* was a big inspiration for this section. It's a must read, in my opinion.

Lessons From 100 Years Of Direct Mail Testing

After 100 years of direct mail testing, these 3 factors determined the success of a campaign.

1. 60% - *Who* we send a message to.

2. 30% - What we *offer* them.

3. 10% - What *message* we use.

This illustrates an important point. Who you choose to send messages to and what you offer them is 90% of the success in this process. You know what's changed in 100 years? Nothing.

Spray And Pray vs Laser Focus

In the game of chess, there is a lot of strategy and a top-level player might plan 5-10 moves ahead. In the game of checkers, there is very little strategy and it's mostly just a left vs right binary choice. Most agencies are tactical. We want to run our agency like a master chess strategist, one who thinks several moves in advance. We must be *strategic* in both our *thinking* and *actions*. Most people try to generate leads by sending a lot of messages to anyone in their niche badly. A typical copy and paste message just turns off a real business. We want to be more strategic than doing what everyone else does. We want to select a few *proven buyers* and send them a very *personalized*, well-crafted *irresistible offer*. People often ask if this process is scalable. It is. However, even before scaling, we want our process to work. We want to be *effective* before being efficient.

Shoe Buyers

Imagine for just a moment that your marketing service was like a pair of shoes. Who would make a better prospect to sell your shoes to? A person who is barefoot and clearly needs shoes or a person with a closet full of shoes?

While it may seem obvious that the answer is a person with a closet full of shoes, in practice people do the opposite. We often spend energy chasing clients who will never invest in marketing. We try to sell to people who seem to *need* our service instead of people who have a *proven history of buying* it. If a business has grown for 40 years on word of mouth, they probably don’t see the value in spending on ads, videos, websites, copy, or SEO. A lot of agency owners make their lives infinitely harder by chasing clients who need their services in theory (barefoot), instead of chasing clients who are proven to buy (closet full of shoes).

Trust *behavior*, not words.

Otherwise you try to make 2 sales.

1. You should invest in marketing.

2. With me.

Non-buyers will fight you on 1 of those sales. Which one? It's *the first sale*. They simple don't invest in marketing. Many never will. Perhaps they survived 30 years on word of mouth or maybe they're comfortable and don't actually want to grow. The 80-20 says that *20% of people in every industry spend 80% of the money on marketing services*. If you could get 100 people from your industry in a room, 80 of them spend very little on marketing. Around 20 of them would spend the majority of the money. There is also an 80-20 in the 80-20. There is likely 1 person in that room who outspends the other 99 people combined. He or she is your target client, not the one who theoretically could use your services.

The surest sign that someone is actually *willing* to actively spend money on growing their business is that *they are doing it now*. If you can see other shoes in their closet, that's the best sign. Do they run ads? Have a website? Or even dozens of websites? Invest in SEO? Are they active on multiple social media channels? Have Google reviews? Identifying shoe buyers is how we find companies who are already spending $5k, $10k, $100k, or even $1,000,000/month or more on ads. If we're targeting a business, are they already spending on PPC, ads, websites, SEO, TV, radio, and billboards? Are they already buying shoes?

We often look at these successful companies and think, "Oh they already have advertising figured out and don’t need me.” Nothing could be further from the truth. With bigger budgets come more problems, not less. They have more things to manage and hence more and bigger problems.

Which is a better use of time? Contacting one shoe buyer 100 times or 100 barefoot clients once? To the right shoe buyer, there is always a reason why another pair of shoes makes sense. Maybe they don’t yet have dance shoes. Maybe they need hiking shoes. Maybe their old basketball shoes are falling apart. Sales conversations are a lot easier and more effective when you are speaking to a client who has proven buying history and they repeatedly invest in the growth of their business. If you want to save yourself a lot of headaches, only market to proven shoe buyers.

If you chase barefoot clients, there are really *two sales* you have to make. The first sale is *they should invest* money at all. The second sale is investing in *your solution*. It is actually the first sale that is the far more difficult sale. Trust buying *behavior*.

To illustrate how important choosing the right audience is, imagine for a second your service was like BBQ pork ribs. If you went to the Jewish vegetarian conference, how would you sell your ribs? What offer would work? What sales message would be effective? None. These people don't eat meat and they especially don't eat pork. Take the same offer and put it in front of a buyers audience. Imagine now that you went to sell your ribs at an Alabama football game. How hard would you have to work to make sales? You would probably have a waiting line around the stadium. That's how important selecting the right target prospect is. Get it wrong and no sales argument will persuade anyone. Get it right and the sales process is downhill. Flow with the current, instead of swimming upstream. Follow the buying behavior.

Shoe Stores

If shoe buyers show who's buying now, shoe stores are where the infinite flow of shoe sales happen. A shoe store is a *source* where your ideal clients are already buying shoes. We sometimes call these "power partners" or "audience owners". My first agency went from 0 to 100+ clients in under 12 months because a big plastic surgery web design company decided to white label my SEO services to their clients. This meant I acquired clients without doing sales calls. I just got an email 3-5 times per week that we were starting a new client and a payment had been made. This web design company is one small example of a "shoe store".

Shoe stores are whatever other growth solutions your clients are currently invested in. When you make a deal with a big shoe store, your business will grow very rapidly. Shoe stores can be other influencers, trainings, courses, masterminds, events, software, tools, authors, and books. What else are your clients already *buying*? You can market directly to those *sources* of deals. Marketing legend Jay Abraham says that when you're first getting momentum, shoe stores are where you should focus all your efforts. Wise man.

The 6 Proven Ways To Get Clients

Strategy #1: Outbound 1-to-1

What It Is: Directly reaching out to potential clients 1-to-1 via cold emails, direct mail, Linked In messages, DMs, or phone calls.

Pros: Can potentially get immediate results and requires no initial budget.

Cons: Energy-intensive and lowers perceived authority since it's like "digital door-knocking".

How to make it work: To start with, you need to craft a meaningful message. Prospects get a lot of unsolicited spam and are quick to ignore, especially if your message is automated and generic. If you are doing outreach, here is a formula we've used with great success.

Part 1: Personalize

A lot of people think "personalizing" means giving phony, fake compliments. Don't blow smoke up a client's ass. We just want to take 30-60 seconds and find out who we're talking to. If you can creep a potential client's social media profile, see who they are and what they're about, then opening is far more effective. We're showing a potential client that our message is written for them and them *specifically*. As a general rule, take the latest thing going on in their life or business and briefly comment about it. Use sentences that begin with "you", "your", or the prospect's name and not "we", "I", or your company name. Talk about them. Get away from the "I hope you're doing well" generic stuff and replace with specific stuff such as "looks like your trip to Oahu was pretty cool".

Part 2: Name their baby

Every client has a product or service that is near and dear to their heart. It's like their baby. Their baby has a *name*. Use it. This means instead of talking about the generic "more sales", "more leads", and "more customers" that everyone else talks about, talk about their baby. For example, I sometimes get people to offer services promoting this book. It is far more powerful to say "I read your book *Beyond The Agency Box*" than just to say “we can get your more book sales”. Beyond The Agency Box is my baby’s name. Their baby has a name too. Use it.

Part 3: A specific add on first date offer is a give, not a take

Most agency owners make offers that sound more like a “take” than a “give”. When you reach out in a way where you are *giving* value, it makes “yes” a lot easier. There is a great example of a cold email script that got over 50% response rate in the Coldlytics training, which is at beyondagencyprofits.com/outreachcasestudy. We’ve found it’s a lot easier to have conversations with strangers when your hand is extended with something to *give*.

The key with these messages is that they are short and casual. Typically, just a few sentences. We are not dumping long copy and paste scripts to strangers. We’re actually talking to real human beings like they are real human beings. Crazy concept. It’s just like you would talk if you bumped into them at the store. You can also see examples of effective messages on the Less But Better Agency Lead Gen training on the Beyond Agency Profits YouTube channel.

beyondagencyprofits.com/less

Message Repetition

If necessary, follow up goes until they buy, die, or unsubscribe. It's not unusual to send a few messages and get responses immediately. Having said that, the busier and more successful the person is, the more repetition is needed. If you're in the personal development space, it's going to be harder to reach Tony Robbins than your friend the life coach. The busier and more successful they are, the more follow up. Plan for that. We are pleasantly persistent.

Also, I should note the following. We get more questions about cold outreach than any other strategy. I personally think it's *the least effective way* to grow an agency. It's taught to beginners because it's cheap, easy, free, and easy to understand. But that doesn't make it the best. Far from it. You will be competing with 100s of agencies in their messages every day. It is an uphill grind to get interested prospects. You're sending 1000s of messages to get a few dozen people on calls who are 2 out of 10 on the idea of working together. Even when it works, it's a grind. I know 1000s of successful agencies and very few 7 figure agencies got there with outreach. It's rare. Having said that, if you want to grind it out with outreach, here is how we have used it successfully.

beyondagencyprofits.com/outreachtraining

Strategy #2: Paid Ads

What It Is: Running advertisements (e.g., Facebook, Google, or YouTube ads) to attract clients.

Best Use Case: Ideal for scaling once you've validated your offer and understand your market.

Warning: Can waste money if your offer isn't dialed in early.

How to make it work: There are generally 3 platforms that work really well for agency growth.

<u>Facebook Ads</u>

After years of running all different methodologies to get clients on Facebook, here is what worked for us.

Ad to webinar to booking page to 10-15 drip emails all inviting people to a booking page. This is not *the way* to do Facebook ads successfully. Rather, it is *a way that's worked for us*.

<u>YouTube Ads</u>

YouTube ads have been and continue to be a hidden gem for us. This is because we use our shoe buyer process to get in front of buyers for very, very cheap. In fact, in 2025, we get buyer clicks for $0.05 each off of YouTube. When you have a $1k-$10k/month service, it's hard not to win with those numbers. Here is a detailed training on how we use these strategies.

beyondagencyprofits.com/youtube

Google Ads

We have a lot of experience running Google Ads for clients but generally have not run them for our own agency. Mostly because they are expensive for agency keywords. However, I know plenty of agency owners that get their clients through Google Ads. Experiment and see if they work for you.

Strategy #3: Content Marketing

What It Is: Creating valuable content (e.g., blog posts, videos, podcasts) to build authority and attract an audience over time.

Challenge: Requires consistency, and results aren't immediate. The first 30–90 days might feel like nothing is happening.

Long-Term Payoff: Builds a residual asset that keeps bringing clients without additional effort.

How to make it work: Let's talk about the most effective kinds of content.

Speaking on stage
You find industry stages, offer value to their audience with new ideas, and get in front of groups of buyers at once. Speaking on stage is one of the best ways to consistently attract premium clients. Because premium clients spend money to go to conferences to seek solutions.

Podcasts
You get interview on industry podcasts and deliver valuable insights to their audiences. Again, this gets in front of groups of buyers in your industry. Especially effective when they are industry specific podcasts.

Webinars
You create valuable trainings and resources. Then through organic or paid social media, invite people to watch your training. At the end, you invite them to work with you.

YouTube channel
You create videos on a narrow range of industry topics and people find you over time through the platform.

Magazine article
You publish valuable information in the industry

magazine that gets distributed to an audience of people in your niche.

<u>Write a book</u>
You publish a book on Amazon and clients find you through the book. Works extra well if you get reviews and run Amazon ads to your book.

<u>Case Studies</u>
Nothing attracts clients quite like results. You show off your results and tell the story of the client problem, what you tried, why you tried it, what worked, the results, and what you learned in the process.

<u>Communities</u>
You join communities, typically on Facebook or Linkedin.. Then you answer questions, contribute to the discussion, network, and create resources. Over time, people reach out and ask for your help.

Content also opens doors. As you publish content, opportunities will find you. The problem with content? It's *cumulative* and takes time to really work.

First 90 days

No one cares. Not even your mom likes your stuff. The algorithms show no love either. This is where most people give up.

90-180 days

You get a small trickle of leads here and there. Definitely not enough that it feels worth the effort.

180+ days

It's starting to pay dividends and you can see that it's actually working. The algorithms are starting to send you new people.

1-2 years

You're a known expert in your industry. People reach out daily to get your help. You couldn't turn off that machine if you wanted to because you have so much content working for you online 24-7.

2-5 years

You're a real industry celebrity authority. People will ask for your autograph and act like they're meeting someone famous. You have your pick of the litter of who you want to work with. You have endless inbound opportunities. The cumulative pipeline works for you 24-7.

Unfortunately, most people give up in the first 30 days when nothing happens. They say, "I tried content but it didn't work for me." When you stick with it, it creates a Netflix effect. People binge your stuff.

Strategy #4: Networking

What It Is: Engaging with others face-to-face or virtually at events, conferences, or local business groups (e.g., BNI).

Why It Works: Builds personal relationships and trust quickly

Limitations: Time-consuming and less scalable.

How to make it work: Networking is all about taking interest and being curious about other people. Serving them. Start by being abundant with helpful ideas. Ideas are free. Implementation is where you make your money. Give other people helpful marketing ideas and strategies for free. The best place to network is generally prominent industry events. You can also participate in local meets ups, BNI meetings, and local Chamber of Commerce meetings. Add value and serve. Help other people to get what they want and who they want. It comes back to you in the end.

Strategy #5: Leveraging Audience Owners

What It Is: Partnering with people or organizations that already have access to your target audience (e.g., podcasters, industry associations, software companies, conference owners, coaching programs, masterminds, etc).

Strategy: Offer valuable content to their audience. This gets immediate attention on your offers. Build long term relationships that can turn into referral opportunities. For example, publishing in an industry magazine or appearing as a guest speaker on a niche podcast.

How to make it work: Add value to other people's audiences in the form of ideas, strategies, processes, tools, and systems.

When I was 13, I used to sell chocolate bars door to door for the blind. We'd spend 4-6 hours in the hot summer pounding on doors. After a shift, I'd walk away with $50-100. As a kid, that covered all my biggest desires - candy, chocolate, video, games, and movies from Blockbuster. I thought we were crushing life. After hours and hours of pounding the pavement, knocking on doors, getting rejected for the 1000th time, we had our sales. It worked but fuck me was it ever a grind. Outreach is the modern form of digital door knocking. If you message a bazillion strangers, you will sell a few chocolate bars here and there. Eventually, will get your candy and video game needs met. But it's literally the least efficient way possible. It's a ton of effort that leaves little time left over to serve clients. Plus, you annoy the ever living fuck out of a lot of people in the process. And nobody sees an expert heart surgeon knocking on doors. You give up a lot of "expert status".

Every now and then, our manager would drive to the local grocery story. He would ask the manager if we could offer our chocolate bars outside the front doors. When they said yes, we'd park 2 kids at every major entrance. Here’s the crazy part. We would sell more chocolate bars in 10 minutes than we did in 6 hours of door knocking. There was a steady flow of buyers with money. Not just random strangers, either. People who left the house with the intention of spending money on food. Cash in hand. Going by every 5-10 seconds. We tapped into their existing *buyer flow*. I always asked my manager why we couldn’t just go to different grocery stores. There were over 100 in our city. Instead, the next day we’d go back to door knocking and pounding the pavement for 4-6 hours. Yet going to the buying audience always worked better.

This works just as well in your agency niche, FYI. Jay Abraham says he likes to ask himself what people buy before, after, and instead of his product or service. In every single niche, there are people who have spent 5, 10, or 20 years building up buyer flow. You don't have to create buyer flow with sheer effort. You can tap into what's been already created for you. The grocery store already has enough buyer flow to keep you fed for a lifetime. People already going there to buy what you sell. And there are plenty of digital “grocery stores” around. All you have to do is add value in the process. When you contribute something to an industry audience, it’s not unusual for 5, 10, or 15 clients to reach out.

Note: I sometimes use different metaphors and names for these people. Shoe stores. Grocery stores. Deal sources. Audience owners. We're talking about the same people. People with buying audiences in your niche.

The 7 Types Of "Shoe Stores" AKA "Grocery Stories" AKA Audience Owners

Expertise: Coaches, course creators, consultants, masterminds, etc.

Content Curators: Podcasts, magazines, authors, YouTube channels, blogs, etc.

Community Leaders: Facebook groups, Linked In communities, real life meetups, etc.

Industry Associations & Organizations: Especially in offline brick and mortar niches.

Software, Suppliers, & Tools: CRMs, financial and accounting software, automation, physical tools, equipment, machines, power tools, etc.

Events, Conferences, & Workshops: Big industry events, workshops, retreats, etc.

Other Service Providers: SEO, PPC, web design, accounting, financial, legal, etc

These people already have your buyers. With audience owners, you must be *strategic*. An audience owner will simply not promote you to their entire audience on day 1. Why? Because if they recommend something that sucks, they lose years of trust they built. There is too much reputation risk. If they recommend you and your stuff is no good, their audience will never buy from them again. That's why they won't just blast your service to their entire audience right away. However, if you know how to build trust over time, they absolutely will promote you. Often it takes just a few short weeks to get there. It helps to think strategically. Here is our general approach.

Coffee date: Let's do something for their audience. You give free and valuable information. Training, tools, resources, processes, strategies, etc. In essence, you show their audience how to get results, even if they never hired you.

First date: You do a paid engagement for 1 or 2 of their people. You're proving it works for them in a low risk way. This way they can assess your service without having to risk their entire reputation.

Marriage: This is where you suggest to give your service to all of their people. In the process, you do something to make them look like a hero to their audience. You can potentially offer a kickback, though you don't have to. They key is that they look great to their audience. Figure out how to do something extra for their people you don't do for just anyone.

Note: Working with audience owners is our preferred strategy inside the WolfPack mastermind for agency owners. Audience allow you to do more damage sending 1-5 messages per week that a third grader could write than people do with 10,000 outreach messages. It's easier to get on a podcast 10,000 dentists listen to than to message 10,000 dentists one at a time. Plus, you give value first and people trust you as the expert. They show up at least 8 out of 10 on working together in stead of 3 out of 10. You can learn more about this strategy inside the WolfPack mastermind at beyondagencyprofits.com/wolfpack.

Strategy #6: Referral Partners

What It Is: Cultivating relationships with individuals or organizations that recommend your services to others.

Why It Works: Referral partners often have built-in trust with their audience, leading to higher conversion rates.

Pro Tip: Strategies 5 and 6 work best together because *audience owners make the best referral partners*. They already know everyone in your industry. Often they've built relationships with everyone for 10, 20 or 30+ years. They're a trusted name. They have reach and influence.

How to make it work: If you want to win over referral partners, give before you get. The best things to give are high value for them but also high leverage for you. Ideally, something you can do in 10-15 minutes or less to move the needle for them.

For example, in our 90 day challenge, we noticed one of the industry associations was trying to sell an event. They made one single post about it. Then weren't sure where to go from there. We went inside ChatGPT and asked for a 30 day calendar of posts about their event. It gave us ideas about each speaker, each talking point, the venue, testimonials, etc. Then we had it write 30 days of posts and gave it to them. They were blown away that we were so helpful. They immediately asked if there was anything they could do for us. We asked if they knew anybody looking for the kind of services we sell. We had a $6k website an hour later. Why? Because they already knew 1000s of contractors already.

Help people of influence in your industry to accomplish their goals. Generally speaking, really good things come out of it. Also, do it with leverage. Do things that move the needle for them but take less than 10-15 minutes for you to do.

Here's a video overview of the 6 best ways to get clients.

beyondagencyprofits.com/6ways

Note: There is one strategy I intentionally omitted from this. Job sites like Upwork and Fiverr can also work. However, I omitted them because I feel like they mostly attract clients who are just looking for the cheapest price.

Layering Strategies

These strategies work best together. This is the essence of strategic marketing. In theory, 1 ad plus 1 outreach message plus 1 piece of content should be 3. But it's more like 1+1+1 = 10. If you cold outreach to someone who is also seeing your Facebook ads, watched your webinar, and binges your YouTube videos, it will have a very different effect than if you just DM them totally cold. One thing I learned from the top attorneys is that they advertise everywhere. Being "omnipresent" is the single best strategy. It's difficult to track each individual ad but the collective system always works. The end goal is for *clients to see our stuff everywhere*.

Organic content and paid ads work best when they are utilized together. Here's how we like to do it. We start with audience owners. This kills multiple birds with one stone. How? Because we are forming strategic relationships with audience owners. Over time, those people become our best referral partners. We also get authority content in the process. And that content makes for the best performing ads you'll ever run. Why? Because those people already have trust in the industry. That means we can connect with a single audience owner, create valuable content for their audience, simultaneously be creating a winning ad, and begin a relationship with someone who will eventually become a valuable referral partner. You can easily generate a million dollars per year or more with one single partner. Not bad for a 4-sentence message that took 45 seconds to write. The real magic is in strategically combining these strategies. Here is a video breakdown of how our best high ticket funnel works.

beyondagencyprofits.com/funnel

What's Important Here?

You've now seen the 6 strategies that work. The most important thing is that you *proactively get in front of the shoe buyers and shoe stores* in your market. A lot of beginners spend a lot of time doing things they think will bring clients. But in reality, they're not actually productive. You do not need to update your website, dick around with the logo again, get business cards printed up, get a fancy flyer printed up, and all those kinds of actions. I have friends whose agencies hit $300k/month *before* they even had a website. You need to *proactively get in front of buyers*. You're either going to use your time and energy (organic) or your money (paid ads). I personally like to use organic to validate my offer and paid ads to scale them and add speed. They work best together. It's not an either or.

It's key to go *where clients already go*. Where do the shoe buyers already gather now? This is different from niche to niche. An ecommerce store owner may hang out in a Shopify Facebook group. A dentist may belong to a professional association and attend an annual conference. A roofer might be mostly offline and a face to face or a phone call may work best. Figure out where your shoe buyers are and go where they go already.

Managing Offer Risk Intelligently

Remember that 60% of the success comes down to selecting proven shoe buyers. The next biggest piece, around 30%, is your offer.

There is a simple rule of thumb to use when making a first date offer to someone.

1. If <u>you *have* proof of concept</u> and have lots of proof and testimonials, hammer them with the proof and ask to be paid up front.

2. If <u>you *don't* have proof of concept</u> and it's a new offer, you give them favorable terms. Either you do it for a discount or take on the risk and ask to be paid after the result has been produced.

If you have a new offer, be very *strategic* with this. We need to manage our risk intelligently. We don't want to do a bunch of work that we don't get paid for.

Let's say you work with dentists. We don't want to beg just any dentist to work with us. We want to *carefully select a proven shoe buyer or shoe store* that has demonstrated that they can and will spend money. We carefully craft an offer that adds on, is specific and meaningful, brings $100 bills, and is a small commitment. Our offer should sound something like, "Hey why don't you take home this pair of shoes for a week, try them on, and if you like them, we'll just bill you at the end of the week. If for some reason it's not a fit, just let us know before the 7 days is up and we'll take your shoes back. No questions asked."

If you're okay with being paid second on a new offer, getting deals can be easy. Because we risk doing work and not being paid, we want to be smart and manage the risk of doing a bunch of work and not getting paid. We need a big upside potential and manage the downside. We want to do a small amount of result-producing work. Remember, this is not for just anyone. This is for a shoe buyer who can potentially pay us month after month, often for years and years. However, we also don't want to be on the hook for a big hairy deliverable. We do only a small amount of result producing work to test to see if the client pays as they say they will. Just be sure that what you're offering is a small and meaningful deliverable. Not every deal will work out but lots do and lots turn into lifelong clients. And don't forget to turn every client result into a case study to be used in your marketing later.

If you want a free first date campaign that has generated more than $100,000 for a client in 4 emails, you can download this free campaign template at beyondagencyprofits.com/template. No optin required. The first date campaign has worked in 100s of niches.

The 3 Levels Of Expert Positioning

There are only 3 ways you are ever going to position your service. Each level commands a vastly different fee. Which one are you?

1. Gerry Generalist
2. Steven Specialist
3. Cedric Celebrity-Authority

Gerry Generalist: Gerry offers a general marketing solution to anyone in the market who has a credit card and a pulse. He has the lowest positioning and hence gets paid the least. He often tries to find cheap help to support all the *custom* solutions he delivers. He scrambles for third world freelancers and unqualified VAs. Clients don't generally pay Gerry a lot. He has a lot of moving pieces and is often expected to perform fast cheap miracles. The clients who hire Gerry often see him as the savior and invest their last few dollars with him out of desperation. With every new client, Gerry starts again at zero. Each solution is brand new. Both sales and fulfillment are overly difficult for Gerry.

Steven Specialist: Steven has specialized his marketing solution to a particular niche and has one deliverable. Because he is known as an expert on one thing, he earns more than Gerry. He's solving the same problem again and again and therefore has a more efficient solution. He finds people with a common specific scenario. He can often scale his agency without much effort because he has a tight deliverable and niche. He tends to attract clients who will pay more to have someone who knows their specific industry. Sales and fulfillment are easier because he reuses a lot of materials from client to client.

Cedric Celebrity-Authority: Like Steven, Cedric has specialized his solution in a niche. The difference is that Cedric also uses the power of media to create a *reputation* that precedes him. Clients see Cedric on stage, in books, on TV, on podcasts, in print, he gets endorsed by other influencers, and he is regularly interviewed as an expert. Clients consider Cedric a renowned expert and pay him top dollar. Cedric tends to attract the top 1-3% of his market. The people who want the very best help money can buy. He can afford the best help in the industry. He also specializes in a certain type of solution and reuses resources. For Cedric, sales generally happen *before* people speak with him. They are influenced by his media, books, videos, podcasts, and speaking gigs.

Which positioning do you have in your marketplace? In my experience, the earnings look something like this. Cedric earns 3-5x as much as Steven for the same work. Steven earns 3-5x as much as Gerry for the same work. When I was Gerry, I struggle to sell a $500-1000 website that Cedric could charge $50k-$100k for in the same exact industry. The closer you are to being Cedric, the less convincing you have to do. In fact, people often have to convince Cedric they are a worthy client. Buyers have to sell you that they are ready to pay you and would make a good fit.

Here's a big, big secret of Cedric. He *uses digital media to pre-sell his offer*. Clients chase him. Do you want to chase or *be chased*?

Chapter 6: How We Sell $1k-10k Per Month Client Packages With 5-Minute Loom Videos

This is how we sell $1k-10k/month packages without sales calls using Loom videos.

We've helped hundreds of agency owners in dozens of niches to eliminate sales calls and get rid of "booked appointments". How? The *offer* does the heavy lifting. Sales calls suck anyway and clients don't like them any more than you do. The secret is having a high value, low risk, new and exciting offer that adds on the client's infrastructure. When the offer does the selling, all that's required is a simple 5-minute summary video. You can watch an old but good free training about how to create your own 5-minute Loom video at beyondagencyprofits.com/loom.

A lot of cool things happen when your offer is an easy "yes" and it can be sold through a video.

Cool benefit #1: It's a lot easier to get someone to watch a 5-minute video. A 60-90 minute sales call with a stranger is a difficult sell. Especially if they are successful, have money, and value their time. There is a risk of being aggressively hard sold and wasting time. This way, you just invite someone to watch a short video. A short video is a lot easier to say "yes" to than blocking out an hour call. A video will often get 10-20x the interest as a sales call about the same thing. Plus they can watch it on their own time without having to coordinate schedules.

Cool benefit #2: It actually attracts higher quality, more "doer" kinds of clients. In the beginning, we figured a sales call still held value. Their purpose was they helped to screen for the right clients. It's actually *the opposite*. The best people come through a video because their time and intelligence has been respected. A lot of broke clients have time to jump on the phone with anyone who offers a sales call. Peeps with money got things to do. They prefer a short concise video with details like the price, which people normally try to hide until the very end.

Cool benefit #3: It works better than salespeople. I have had some great sales people and many more duds. Salespeople are human. They all have off days. Life happens. Even my best sales closers needed reminders and motivation. Loom videos never take a day off. I no longer have a "sales" team. Less stress. Less moving pieces. And my sales team works 24-7 365 days. We even close sales on Christmas while I'm unwrapping presents with the kids.

Video closing has a much deeper value behind it. It's called leverage. Because video you can work 24-7 365 and deliver perfect presentations even real you is stumbling, fumbling, and drooling into your pillow. The hardest working person in your company can be digital you.

It's time to make some magic happen. This chapter will help you *design* your entire business with *leverage* in mind. You will sign clients without the need for a phone call. Remember that once your offer is desirable and sexy, there are a lot of ways to get clients. A great offer doesn't need all the arm twisting, persuasion, and coercion that most agencies rely on. Those are tactics reserved for difficult to sell offers.

Selling $1k-10k/Month Agency Services Without A Phone Call Using 5-Minute Loom Videos

A lot of people believe you can only sell high ticket services with a phone call or that their is an upper price limit of what can be sold through video. They are pretty shocked to learn that *our agency hasn't done a formal sales call since 2019*. Also, that we have helped people close million dollar deals without talking to clients on the phone. The traditional agency involves getting a prospect to show interest, schedule a time on a calendar app, have a 60-90 minute phone call together, and only at the end of that call make an offer. In lieu of all that, we just send clients a short, to the point 5-minute offer video. We answer any questions over text, email, or messenger. That's our entire sales process. It also works exactly the same in a Google Doc if you're more of a writing person. If you want to see a detailed training on these 5-minute videos, go to beyondagencyprofits.com/loom.

Loom videos are made of 5 basic parts.

Part 1: Dramatic Demonstration

Part 2: Call out your ideal client

Part 3: 3-5 Step Believable Plan

Part 4: Easy "yes" offer

Part 5: Tell them exactly how to buy it.

Here's how these videos are structured.

Part 1: Dramatic Demonstrations (15-30 seconds long)

Demonstrations are powerful! Do this right and 60-80% of the sale is made in just a few seconds. Remember that clients don't want our hammer. We can only describe our hammer one of three ways.

1. What symptom do we help a client get rid of? What problem will it solve?
2. What result will it produce?

3. What symptom and what result together are our "before" and "after"?

We are either giving them a way out of a problem or the keys to a desirable result. We are not telling them that we have a hammer like SEO, AdWords, a website, videos, copy or some paid ads. We are describing problems solved by our hammer and results created.

Then we want to create a visual picture of this. We call this a "dramatic demonstration". Years ago there was a window company in Florida that sold hurricane-proof windows. The company's top salesperson outsold the next top 5 sales people combined. Everyone couldn't figure out how he was doing it. Was it a great closing script? An objection handling sequence? He revealed the answer at their big annual conference. At the start of every presentation, he grabbed a hammer and a window. He then smashed the window as hard as he could and it didn't break. Then he said, "See? Hurricane-proof windows."

Like a movie, we want to show a *visual picture* of what the result looks like. Where in their reality does that result show up? What does it look like when it's done? Is it an email form filled out? A specific type of phone call they will get? A payment notification in the inbox? How would they know they've gotten the result? Demonstrate that. Play an example phone call. Show the lead form. Show the inbox payment they get. Say it in a picture. People understand pictures and demonstrations way faster than words.

Part 2: Call Out Your Ideal Client

If you've worked with a handful of clients, you can probably tell what makes an ideal client. You can probably tell what makes a shitty client. What do you actually need to be successful in this relationship? What does your client need to do for this to work? For example, if you've noticed that your idea clients call the leads back quickly and then give a professional sales quote, this is where you say it. We want to create 1-3 binary conditions that describe what has to happen for this to work. This is how we screen for the right people in video. Here are a few examples.

"This will work for you if you can call the leads back within 3 minutes and deliver a professional quote."

“This will work for you if you send us before and after pictures of every job you do.”

“This will work for you if you are already selling your $5000+ coaching offer and simply want to add some speed.”

Part 3: A 3-5 Step Believable Plan

This next part is by far the biggest missing piece in most people's sales process. Often lots of peeps talk about “proprietary” this, “secret method” that, or their magic “7-step process”. That shit works really well on newbies and low ticket stuff. If you're dealing with a busy, seasoned, relatively successful, business owner, he or she has been around the block. They don't need marketing lingo and bullshit. They need *transparency*. They want the result you offer, perhaps even need it. However, they also need to see a believable path to get them there.

You want to be transparent without being overly detailed. Think 30,000 foot view. Just 3-5 steps of how you take people from problem to results.

Here’s what a 3-5 step plan might sound like for a dentist looking to go after high end cosmetic patients.

i. We target people on Facebook who are in the affluent areas within 20 miles of your dental practice.

ii. We run some ads offering a free report about veneers and implants. We license this report to your practice and brand it with your colors and logo.

iii. After patients download the free report, we follow up with interested patients with 52 messages over a year. We use case studies, answering common questions, testimonials, explaining the price, and make special offers. Each individual email offers them a chance to become your cosmetic dental patient.

That's it. 3-5 steps. There is no getting into the bells and whistles of Facebook pixels. Just a clear, believable plan from a 30,000 foot view. Clients can see how they're going to achieve the result. Again, demonstrations work here too. It helps to show each step visually. Turn each step into a picture. It’s better to have real screenshots of actual steps than overly polished professional images. Remember that people have generally had bad experiences with marketers and don’t trust our industry. They need a real believable solutions not a polished sales pitch. The clear, believable plan brings the prospect from *desiring* your result to *believing* that you can achieve it for them. It's not just desirable. It’s logical. “Hey I can see how that would work.”

Also, this is the part of the sales process, through video or calls, where the vast majority of objections happen. Usually the objections are similar too “that sounds similar to something I tried that didn’t work”. You want to make sure you highlight little key differences in your process that ensure they will be successful this time.

Part 4: An Easy "Yes" Offer

Most agencies have hard to sell offers. Hard to sell offers are how you end up in proposal hell, chasing someone who doesn't return your emails or phone calls. "Just messaging you to see if you have reviewed my proposal yet." Followed by, "Hey sorry been busy not yet."

As we discussed early, ideally have an offer that accomplishes these 4 things.

A) Clear and specific.
B) Small first date.
C) Adds on.
D) Different and desirable.

I did an interview with a guy who brought in $10,000,000+ in sales with one webinar. That's not his only one either. He's literally critiqued thousands of webinars; the whole spectrum from extreme successes to sucky losers. He's also helped transform many beasts into beauties. I asked him 3 very, very interesting questions.

Question 1: "What's the #1 mistake that most people make in a webinar?"

Without hesitation, “They try and teach too many things at once. A confused mind says no.”

Question 2: “What's been the most important common thread among your big successes?”

Without hesitation, “It's the offer. A webinar is just a carefully crafted vehicle to deliver a killer offer.”

Question 3: “How does one make such a killer offer?” He says most people really just want to know 3 things:

1. “Will it work for me?”
2. “How long is it going to take?”
3. “What can I expect when it's done?”

Remember clients don’t have care about all the details. They just want something real that works. If your strategy worked by painting zebra buttholes with their company logo and prancing them through town.. and it actually worked... they would pay you for all that stripy goodness. They don’t care about your solution. Only what it does for them. Keep your offer clear and concise. Then present the price using the IVQ formula from earlier.

Investment: Here’s the price.

Value: Here’s what you get for the price.

Qualify: Here’s who it is specifically for.

Part 5: Tell Them Exactly How To Buy It

We often think clients automatically know if they want to buy it, they just have to tell us. That isn't generally true. Every agency has a different process. Do you have an onboarding form? A Stripe or PayPal link? A 1-to-1 call? A zoom meeting? Clients don't automatically know. It's your job to spell out your buying process in clear detail.

Years ago I got hired by a big law firm because they had a phone closing issue. I was hired as an outside consulting to troubleshoot the issue. I listened to a 20 minute call with a lawyer talking to a potential divorce client. The lawyer was very friendly and helpful in answering the person's question. The first 19 minutes of the call were totally flawless. Then came the end of the call. The client said, "So where do we go from here?" The lawyer responded saying, "Well that depends on what you want to do next. Was I helpful in answering your question?" The person said, "Yes." Then he said, "Well call us back if you want to get started." Then he hung up the phone.

Here's what that lawyer didn't understand. That person wanted to buy their service and didn't know what to do next. They didn't automatically know they are next supposed to schedule and in person consultation. They don't know how the pricing works. They didn't how the retainer works or how to pay it. They have no idea what the next steps are. They couldn't buy if they wanted to.

Don't be that lawyer. You need to tell clients in clear detail what to do next and how to get started. "If you would like to get started, you're going to want to click the orange button below this video that says 'get started'. It will take you to a checkout page that looks like this. After you complete the checkout, you'll get an onboarding form that looks like this. On this form, we're going to ask you for A, B, and C. This helps us with setting up your campaign. After you complete this form, you'll see this thank you page. Within 12 hours, Jenny from our team is going to reach out to you by email. We'll let you know we received everything at our end to get started. So if that's you, go ahead and click the orange button below this video to start this process."

One Loom video for everyone or a custom video for each client?

In beginning, we usually customize the first 5 to 10 videos. We do this until "yes" becomes a predictable response. Then we do one video for everyone.

Most common mistakes with Loom videos

Mistake #1: "I just made this video to tell you about our service." Clients don't care about you or your service. You're showing them a result that is possible. Talk about what happens for them. It's about the client and what they want and not you and your service, even if they buy your service at the end.

Mistake #2: Robot voice. This is not reading an uptight script. Keep it conversation and relaxed.

Mistake #3: Get all the way to the end and then don't tell them how to buy it. Be specific about what they need to do next to get started.

Mistake #4: The 3-5 step plan isn't clear. Often it's way too detailed and gets into the weeds about pixels and SEO. The opposite also happens. It's too generic and unspecific, using platitudes like "optimize", "improve", "measure" without giving specifics about how you intend to do those things.

Mistake #5: Burying the lead. Journalists have a term called "burying the lead". It's when the 12th sentence of the story was the thing that should have been the headline. Show them your most powerful proof of result right away. Do not wait to get to minute 3 of the presentation to show it. There's no guarantee a client will even watch that far.

Here is a secret to video sales. We actually use real conversations in chat or over the phone to figure out what people actually want. Then automate that process in video. I typically do 5 to 10 chat conversations or phone calls and take copious notes first.

Before You Create A Video, Talk To Real Clients First

There is a very important milestone to achieve in a *freedom-based agency*. You need to get off the phone. Either you need to hire and train great salespeople or your offer needs to convert without a phone call. In order to do that, it's a good idea to talk to real clients first. The phone is merely a tool. When we use the phone, we use it with a very specific purpose in mind.

We want to use the phone to figure out what problems and results our shoe buyers need help with. We're here to deliver ethical value. That means don't over promise just to get a credit card. We're actually helping people and we only offer what *we can actually deliver*.

How To Automate And Leverage Your Sales

In nearly 20 years of running an agency, I've done 1000s of sales calls. Sales calls are not as unique as most people think. If you talk to a few people in your industry, you will hear the same problems again and again. Often in the exact same words. Here's an example conversation I've had 100s of times.

Lawyer: “I need more clients.”

Me: “Why do you need more clients?”

Lawyer: “I have roller coaster income.”

Me: “What do you mean you have roller coaster income?”

Lawyer: “I don't really have any control over my business. One month I will make $2,000 and the next month $80,000.”

Me: “Why does that happen?”

Lawyer: “I'm dependent on referrals. I never know what my referral partners are going to send me each month. Some months it is a lot. Other months they don’t send anything. I don’t know if I should invest money in staff and grow or conserve cash to pay my bills next month. I have a business I have no control over and I hate it.”

Imagine now that the opening slide of a Loom video that says...

Lawyers:
Need more clients because you have roller coaster income coming from 3-6 referral partners? Listen to this example phone call we generated from Facebook ads and we can control when we get these calls.

Then we demonstrate the result. Perhaps we could play a real example phone call we generated. See how that one slide gets us 60-80% of the way to a sale?

We’re Looking For The Words Of Pure Gold

We have extreme power when we can see a client’s problem with great clarity. Why? Because what’s said in calls goes right back into our marketing.

Imagine you’re a lawyer and you see an ad like this. “Attorneys: Do you have roller coaster income because you have just a few referral partners who aren’t consistent? Do your partners send you 6 referrals one month and zero the next? Joe was able to eliminate the roller coaster income in his practice. Here’s a case study on how he did it.” Then you click on a video and it shows you a real example.

Therein lies the purpose for the phone or direct chats with potential clients. We want to get deep insight and exact wording. We must *know their problem better than they do*. Typically we can get this info in 5-10 phone calls or chat conversations, sometimes less. Doing this speaks to clients on a deep, deep level.

When it comes to creating powerful marketing, *pros don’t guess*. We cannot speak to clients unless we truly know what’s happening in their reality. This is about *listening* and *parroting back*. The purpose of a phone call is to make your video hit the bullseye every time. Once we have their exact problem in their exact words, we can move away from the phone. We can put those words of gold in places that can be *leveraged* like email, through retargeting ads or anything else automated and leverage-able. This is powerful because your offer becomes deeply insightful to clients.

When we put that kind of leverage into our marketing, the phone calls quickly become unnecessary. Even when clients request a “sales” call, it will be 5 minutes long. “Hey I just have a quick question.” Nine times out of ten, that question will be, “Will this work for my situation?”

Having Only Pre-Sold Clients

Once you understand a client’s real problem in their own words with nuances and all, the phone is unnecessary. You also don’t have to convince anyone. They're already convinced. They just need to know how much it is, how the process works, and how to get started. They’ve lived with the problem long enough to know it needs fixed. You’ve already done the “convincing” before a call by *hitting the bullseye with your messaging*. Above all, great copy is *accurate*. It enters the conversation already taking place in your prospect’s mind.

At this point, there are 3 typical outcomes. A large percentage of people buy without you even talking to them. Some people watch the video and never buy. This saves you a 60+ minute conversation with someone who was never going to buy in the first place. That’s also a win. Some people have a last minute question. They typically ask a variation of, “Will this work for me?” By then, you can also close in chat or by email. Closing is a matter of a simple, “Can you tell me a little bit about your situation?” Followed by a simple “yes we can help" or "no sorry we can't help you". The phone is not needed to do that.

Above all, before you get on the phone, have a plan. Get out a pen and paper and take copious amounts of notes. Record the calls if you can. Get clients *exact wording* word for word. This is why I prefer text conversation for this these days. You want to think about using the phone as a leverage-able asset. Put insight from the phone into your marketing. Here's why you want to close without phone calls:

Marketing Is Leverage-able. Sales Are Not.

We cannot leverage "sales". That's why sales managers get big salaries and have to train and motivate their staff daily. Most people rely on their salespeople to do the heavy lifting. They get on the phone with people who are 3 out of 10 "sold" about working together. Those prospects are long ways away from being "sold". Agencies use the sales call to bridge this wide gap.

By using your marketing to accomplish the warming up process, you will only deal with people who are 8 out 10 or better about working with you. It makes the sales call far less important. We take the *80-20 of what worked in a sales call* and distribute it in a *leveraged one-to-many form*. This also makes the sales outcome far more repeatable. If you have 5 blog posts that do the heavy lifting for you, that is leverage-able. If you have a great webinar that presells, that is leverage-able. If you have a case study video that converts, that is leverage-able. You can use those conversion assets again and again *without ongoing effort*. You want your marketing to do your selling, not your phone persuasion skills.

There is another reason to do it this way. It reduces refunds dramatically. This is because *clients sell themselves* on you. If you need to “persuade” people on a phone call, they often have buyer’s remorse later. Don’t be surprised when clients act wishy washy after a pushy phone sale.

Video done right ensures everyone is *pre-sold* and *pre-qualified*. Clients are already “sold” before speaking with you. This gives you massive leverage to scale and grow. It also allows you to actually be free. Plus, if you do want to go old school and have salespeople, how hard is it to find good ones when they aren’t coercing anyone? It’s just like how McDonald’s doesn’t depend on the pimply face teenager to convert. They let their offers do the heavy lifting. Same as how Apple doesn’t hire trained sales pros. The iPhone offer sells itself. They’re closer to order takers. It’s dog shit simple to “close”.

Leverage 101

There is a deeper idea behind video sales. It’s *leverage*. The ability to separate sales and you. To have *digital you* do the heavy lifting.

Leverage Is Your Key To Freedom!

When it comes to getting things done, you are always operating from one of 4 levels.

Level 1: The Firefighter

This is when we do what's seemingly *urgent* and pressing. We are *reactionary* to email and text messages. If a client emails us and asks to call them, we dial them up as soon as humanly possible. If we get an email, we feel the need to respond to it immediately. Most of our day is spent reacting and *putting out fires*.

Level 2: The Prioritizer

This is where we're not just responding to the urgent messages. Instead we're working on what's most *important*. Sometimes what's urgent and what's important are the same. However, most times they aren't. We are more *proactive* in this stage than in level 1. We have learned that it's okay for people to wait a little while. We spent a good part of our day *driving the business forward*.

Level 3: The Long Term Thinker

This is where we're not just thinking about what's important now. We're also thinking about the *long term upside potential*. We are playing the long game and the short game at the same time. We're working on what's most *important* and what has the ability to *keep paying us again and again* over time. We prioritize projects that create leverage. If a project can pay us $10,000 today and $10,000 every year, that is more valuable than just making a single $10,000 sale today. We are building things that have both a short term and long term pay off. We spend a lot of our day *creating assets*.

Level 4: The Automated Asset Machine

Level 4 is similar to level 3. It is working on important projects for the *short and long term value*. What's different now is that our *people, systems, and processes automatically create assets*. Just like Ray Kroc doesn't have to make every Big Mac or open every new store. His *processes do most of the heavy lifting*. We are focused on removing ourselves from the equation so we don't have to create everything. Our processes and systems clone your results. We get things done our way and other people do it for us. We spend most of the day creating *systems and processes*.

Most freelancers and agency owners spend their time on level 1 and occasionally level 2. This is where *the least productive things get done first*. But they're urgent. Being a long term asset creator is where you're going to find your freedom. Choose to be in the higher levels more often.

Also, if you've gotten value from this book, leave a 5-star review on Amazon. This helps other people know this book is a useful resource for agency owners. By sharing key principles, it also helps you better retain the big ideas.

Chapter 7: The Agency Model Reimagined

This next chapter is about partnership style deals. Let’s be very clear, these types of deals are not for everyone. But if you’re ready, they can be the most profitable and scalable deals you’ll ever make. This chapter is advanced. In fact, many of you aren’t ready to apply the stuff in this chapter. However, for those that are ready, partnerships will be the most profitable clients you’ve ever had. Plus, they’re actually easier to get than traditional clients. We’ve had people in our mastermind who have had *7 figure weeks with 1 single partnership*. It’s simply not possible to make a million bucks with one single client in 7 days with the retainer model. However, it is possible with the right partners.

There are 3 basic levels you go through as you grow your marketing business.

The 3 Levels

Agency Owner Type	Mindset	Business Model	Outcome
Poor	Works with anyone who pays	Low-ticket services	Overworked, no profit
Middle-Class	Seeks stable retainers	Monthly fees	Steady but capped income
Wealthy	Focuses on ownership	Performance/ partnerships	Wealth & control

Poor and middle class values vs wealthy values

Most agencies are just middle class values in disguise. They want a guarantee salary (retainer). The problem? What happens when you 10x a client's company? Do your shares increase as a salary employee? Or is the only benefit that you don't get fired?

In 2007 in my first agency, I charged $400/month per SEO client. It seemed like a psychologically satisfying number at the time. In the first few months, I had a few dozen client phone calls. They were all essentially, "Can you explain this SEO report to me? This stuff reads like hieroglyphs to me."

I got a call from a plastic surgeon in Dallas named Sam. I assumed Sam was just confused about the reports like everyone else. I even began the call apologizing for taking up his valuable time. His response shocked me. He laughed at me and said, “Are you fucking kidding? You’re more valuable than my office manager. I have no idea what you’re doing but people keep calling and telling me we found you on the Google. Whatever you’re doing is working. We’ve probably added $3,000,000 extra since you started a few months ago. I’ve been dying to talk to you and meet you.”

I had no idea. Suddenly $400/month seemed like a pretty low price. Especially because if I had said, “It’s $400/month plus 10% of the growth we create for you,” it probably would have been the same easy yes.

Therein lies the problem with the retainer model. When it works really well for a client, *you don’t own anything*. No bonus. No extra shares. No stock dividends. Not even a high five from the client.

Partnerships have a lot of other built in benefits. You can do millions with a single partner. We have people who have less than 5 clients doing big numbers. They report to no one. They do not have to give updates. They have full autonomy and control.

So why if you go into agency owner communities do people generally say partnerships are a bad idea? Because partnerships have some very big pitfalls. Let’s discuss a few of the big ones.

Pitfalls Of Partnership Deals

1. You have to know how to pick the right partners.

This is equally true with the retainer model. If you pick the wrong clients, they will not stay and pay over the long term. But it becomes even more obvious when you only get paid if and when it works.

Here's who partnerships work extremely well with. The top 1-5% of your industry. Why? Because they have working assets – customer lists, working offers, sales teams and processes, traffic, employees, systems, testimonials and reviews, etc. It's like they already hold the ace, king, queen, and 10 of spades and you're showing up with the jack. The value and assets are theirs and you know where to fit your piece in. Partnerships work when you amplify winners.

Here's who partnerships work extremely poorly with. The bottom 50% of your market. Why? Because they have no working systems. They are happy to let you take on the risk and build their business for them. The problem is that they don't usually know how to sell, their offers are vanilla, and their fulfillment is mediocre at best.

Here's why most people think partnerships are a bad idea. Because the people who propose partnerships are 99.9% of the time the broke struggling business owners. As a general rule, if they propose partnership... run! It should be your idea first and you should hand select your partner. Someone who is already winning and has plenty of working assets to leverage.

2. You have to know how to track results.

Most people think this is a technical problem. I have had partners with perfect call tracking that never paid a cent. Even when we could 100% prove the business came from us. I have had partners with no technical tracking. This still pay us like clockwork because they know that they only win long-term if their partners too. They have an abundance mentality and believe in creating a bigger pie for everyone.

The right way to track your results is with a unique offer. If you go into a pizza place and create a 2 pepperoni pizzas, a large coke, and bread sticks for $29.99, everyone who takes that unique offer had to come from you. We track results by creating our own unique offers.

3. You have to know how to manage the risk of not getting paid.

If you're in the middle class mindset, it says you don't do anything unless you get a guaranteed paycheck. Personally? I say fuck that. Being an entrepreneur is about managing risk intelligently. It does not come with a guaranteed paycheck.

In my experience, for every 5 partnerships you do, only 2-3 of them you will get paid. However, you can earn far more than retainer projects so the net effect is bigger. Most people can't handle this and therefore don't bother. The biggest reason you don't get paid is not what people think. It's not because your partner screws you over. It's because you simple can't make results happen for that client like you thought you would be able to do. In practice, it is more common that clients delay payments than to outright screw you.

This is the risk. It must be managed. The solution to this is simple. We run a simple test first before committing big to a partner. We want to see a few things. Are they easy to help? Do their people like their stuff? Do they pay on time? As a general rule, I only invest a few hours with a new partner and then wait to see what happens before I commit to anything bigger. If they screw you in the small stuff, they will screw you in the big stuff. If they are easy to help and pay promptly on the small stuff, they will in big matters. I limit my invest to only a few hours until a partner has demonstrated they are worthy of a bigger investment. Again, we manage the risk.

4. You have to know when to throw in the towel.

Despite our industry reputation, you probably care. You probably actually want to help people and do right by them. Despite your best efforts, sometimes it's just not going to work out. Again, this is equally true with retainers but you generally feel more obligated to try to force it and make it work. When it's not going to work out, we want to pull out as fast as possible. For example, you may want to send a few database reactivation emails and see what happens. If their own customers don't respond, how are you going to sell it to other people?

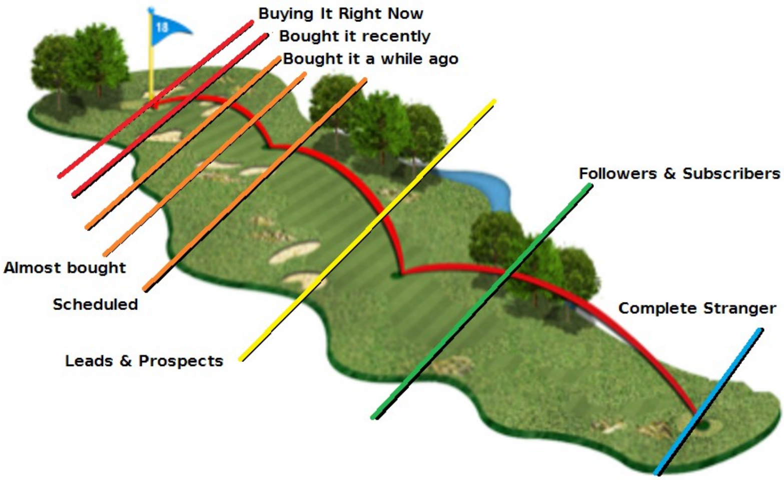
It generally makes sense to start every partnership with a small little test. When it works do more. When it doesn’t, do what I didn’t do with my 3 kids. Pull out.

5. You have to know how to get partners.

Again, you hand select partners. They are generally the biggest and most successful people in your industry. They were successful long before you offered a partnership. The key benefit for them? They generally know they could be doing 1000 things to grow their business and they have time for 3-5 of them. They need good people that can come in and proactively create results. Most employees aren’t built that way, even if they have A players. Your job is to find the easiest way to move the needle for them and propose a small test. If it works, do more. If it doesn’t, go find a better more suitable partner.

6. You have to know which opportunities to work on first.

Most clients go after the hardest possible leads first. Why? Because if you ask 100 clients what they want, at least 99 will say “new” leads, customers, patients, or clients. It’s not that they’re lying to you. They believe that statement to be true. It’s just that they are wrong. They assume every step of their process is fully optimized and they are always wrong.



If you imagine the average high ticket sale like a golf course, there is a process people go through. They start 450 yards away and icy cold. They may follow and subscribe. They may be become a lead or prospect. They may inquire about a service and not buy. There is a process they go through to become a buyer.

Why does this matter? Because the opportunities are in reverse. We first start with putting. Do they have people buying it now we could offer something else to? Do they have people who bought it before that we could invite back? Do they have people who almost bought we could help convert? Do they have people who scheduled but didn't show up that could be won back? Partnerships work best when you're putting and chipping. Taking close to the hole opportunities that a business has simply overlooked in their pursuit of the new customer.

Partnerships are advanced but they are also the most lucrative. You don’t make a million bucks in a few days on a retainer but we’ve had people do it with the right partner. Some have even created 6 figure passively monthly income streams from work they set up once. I shudder to think if they had offered that as a $2k/month service. Instead opting for a “guaranteed salary” over a share of the upside. However, you can lose in these deals. Because partnerships are advanced, I would recommend beginners skip this chapter and get a few retainer clients first. Get a few small wins under your belt first.

Time to reinvent the agency game.

We’re about to shatter the paradigm that most freelancers and agency owners operate under. Because it's an artificial box they put themselves into without knowing it. Here's a big, big shift to make. Most agency models can be summed up like this:

Pay First. Results Later. (Hopefully.)

The problem? Most clients have had nothing but bad experiences with random marketers. It’s a difficult sale to make. They don’t trust marketers and why should they? Often they can’t tell you apart from every other “digital marketing expert” out there.

Here's what that means.

You Want To Bake Your Folks A Bigger Pie.

Which of these is much more likely to get automatic yeses?

Option 1:

How about you pay me $2500 per month plus 10% of ad spend first and in a few months, I'll get you some leads that you have to convert yourself and hopefully you eventually make some money?

Option 2:

If you're cool with it, I'd like to take your ingredients you're not using in the cupboard and bake you a bigger pie immediately, and then only after you're fat full of pie, would you be cool with giving me a big fat slice too?

Hopefully you were noddin' along with Option 2 because there's a moral to this story. *Be a source of cash flow* to businesses. Bake bigger pies first. Get your slices second. Usually about 7-10 days later. Then take a bigger, fatter slice for yourself. Partners would rather own 50% of a watermelon than 100% of a grape.

Hint: If they've already got all the ingredients ready to go, a warm hot oven, a recipe book in the cupboard with a few proven winning recipes, and a database of known pie eaters, pie eaters that they probably haven't even contacted in years, you might just be sitting on a virtual gold-mine-o'-pie. Ya dig? (No pies were harmed during the making of this book.)

That description applies to only about 95% of the businesses in existence. You should be able to find a few.

Partnership Agency vs Retainer Agency

What's the difference and why should you care? Here's how the two look different. Which of these agencies would you prefer?

Strategy:

Traditional Agency - *Trade services* like paid ads, websites, videos, copy, or backlinks and SEO rankings for retainer money every month. Deliver leads that clients must close themselves. No help is offered in closing those leads. It is 100% *the client's responsibility* to convert them.

Partnership - Launching campaigns quickly to bring clients easy cash. *Trade results for fees*. Prefer acquiring and controlling undervalued assets and getting paid cash for result over just earning monthly cash alone. Most of the customers are pre-closed for clients. *Sales are your responsibility*.

Pay Structure:

Traditional - *Monthly fee*, sometimes plus ad spend. Typically $500/month to $7500/month depending on the tier of clients. Most people are towards the lower end of the scale.

Partnership - *Profit share of 30-50%*. Typically at least $10k+/month per client or more by choosing clients carefully.

Mindset:

Traditional – See yourself as a *service provider*. Trade monthly lead generation services for money. Often ends up in a "client-underling" relationship. Clients see you like an employee. You typically try to *marry every client* and get a long term contract up front. Most clients typically last 3-12 months.

Partnership – See yourself as an *investor or partner*. You micro invest into a client to see if they have easy untapped profits. You *first date your clients* to see if they are a fit first. You start with a close to the hole opportunity. Then you go steady with the winners. You get a share of the profits you generate (30-50%) 7-10 days later. If they're not a good fit, most clients typically last a few days. If they are a good fit, clients last for years and years as it benefits everyone involved.

What You're Doing:

Traditional - Building funnels, tweaking websites, spending time in an ad manager, using reporting software, and/or building backlinks. *You spend a lot of time inside the tech*. Often it takes a lot of testing and tweaking to get a client a result. Often you will have a lot of proposals, reports, and unnecessary meetings. You drive the ball 450 yards. Because you are working on the area clients pay the most attention to (their front end), you will most likely be watched like a hawk. *Your every move will be heavily scrutinized*.

Beyond Agency - Running a series of copy and paste email, SMS and/or direct mail campaigns. Uses leverage by reusing campaigns already proven to work. *You manage your time risk by testing small to get a big upside*. We aren't reinventing the wheel. No meetings, reports, or advanced tech are required. You are putting and chipping. Most campaigns work from day one without any testing. *Your every move is seen as a <u>bonus</u> source of cash flow.*

Client Problem You Solve:

Traditional - This is two fold. Clients always "think" they need *more traffic* but almost always their offers, funnels, sales process, and messaging are broken and their average client value isn't high enough. They actually need *help converting their traffic* too. Lots of split-testing and time is needed to dial their system in. You are almost always hired to "bring traffic" when in reality you are actually "making their shit sell". *You help clients acquire new resources*.

Partnership – You *create cash flow*. Often it's as simple as following up with past customers and offering them more of the same thing they already bought before. *You use the resources clients already have*.

How You Help Them:

Traditional - Through a series of ads or rankings, *you drive traffic* to a client's website or landing pages. This (hopefully) gets strangers to buy from them. The problem is that clients often don't know what to do with these leads. You go after the *hardest customers first*; new people who have never heard of your client and people who have never done business with them before. This process takes time.

Partnership - You *help clients sell more* to the customers they already have. You accomplish this with simple gratitude campaigns and offering additional value. You go after the *easiest customers first*; the ones who already bought from your client and the ones who already have a relationship with their business. This works quickly.

Types of Clients You Have:

Traditional – The clients are usually based on *who you think you can get*. Unless you're a top pro at your service who commands top prices, you have downward price pressure. Typically it's whatever client you can get. Your most important criteria are a credit card and a pulse. *You rarely turn clients away*.

Partnership - You *carefully choose the clients* that are the easiest to win with. People who are already winning big in the space. By choosing, you don't go for most clients. You exclude most clients who are more headaches and opt for the low hanging fruit. The most important criteria is a relationship that is a long term win-win. *You don't even make offers to most clients*.

Your Offer:

Traditional - Give me money first, wait a few months while I dial in your leads, and hopefully then you'll see some results. *You are responsible* for converting your own leads. The offer is a tough yes.

Partnership - Let me run a little test campaign and I'll make sales for you. I'll know in a few days whether we can generate profit for you. *I am responsible* for making sales. If it works, I'd like a share of the profits. If it mutually benefits both of us, I would like to continue working together. It's a near-automatic yes.

How Client Sees You:

Traditional - Most *clients see you as an expense* until proven otherwise. When they meet difficult financial situations, you will be the first one cut from the budget. Usually 3-6 months is needed to dial your process in. If you do SEO in a competitive market, you may need even longer. Clients generally think, "You work for me." They also price you against every Tom, Dick, and Harry who runs a similar service to yours.

Partnership – *Clients see you as a source of cash flow* and as an investor or a partner. Clients generally think, "You are an invaluable consultant who pays for themselves." They don't know anyone else who does what you do.

Who Takes On The "Risk":

Traditional - The *client accepts 100% of the risk*. They pay first. They invest with the hope of results later. The extra client risk is why clients often want reports and meetings to justify movement towards the goal. Until the results come, clients feel uneasy about the situation. Often clients have been burned by a smooth-talking salesperson in the past. They worry a lot about ad expenses and your process not working. They have low trust in the process.

Partnership - *You assume and manage the risk* strategically. This is because you're an entrepreneur and you are far more risk tolerant. You are also more knowledgeable about how to manage downside risk. You want big upside when you’re right and little or no time and money if you’re wrong. You choose situations based on the upside potential. You test small before committing to anything big. Clients are open to try it and see what happens without expectations.

Internal State Of Being:

Traditional - This is only based on my own experience. Your experience may differ. Often *you feel guilty* if a client has paid you and you haven't gotten them results yet. You *worry a lot* at night about delivering on the promises you made. You are *trying your best trying to keep everyone happy*. Also, if a client wants a meeting or a phone call, you feel obligated to say “yes”. If a client asks for a proposal, meeting, or report, you almost feel like you have to. You feel like you have to *check your phone or email all the time*. Clients have lots of seemingly urgent requests. There are lots of fires to put out. I used to check my email 20-50+ times per day. It was a virtual “electronic leash”.

Partnership - You don’t start a relationship with any overt big promises made or asking for anything first. Ergo you have no "bosses". You f*eel in control* of the client relationship. You spend a lot of your time *figuring out how to add value* to customers. You don't feel the need to make reports, proposals, or have meetings that are not necessary. Your *clients feel more like friends and partners*. You probably check your email once every few days. You virtually *never receive an urgent request* for a call, meeting, or proposal.

When The Relationship Ends:

Traditional - Either you rocked a client’s results and they don't need you anymore or they expected a miracle and it didn’t happen. Usually the relationship is over in 3-12 months and c*lients generally leave unhappy*. There are some exceptions but typically clients will leave disappointed. Sometimes clients are their own worst enemy. Clients can blame you for their own shortcomings. Managing expectations is crucial to your continued success.

Partnership - You decide the client wasn't a fit after a small test and wish them well on their journey. Nobody is mad or disappointed at the other party. It’s like a first date where *you mutually agree not to have a second date*. It always helps to manage expectations, although without big overt promises, there aren't a lot of expectations to manage.

Client Expectations:

Traditional – Typically *clients expect results quicker* than it takes in reality. Clients generally believe generating new business is "binary". They believe your solution either works or it doesn't. This means they often don't have patience to see the entire process through to the end. Because they often don't give you working offers, funnels, and messaging, they often hire you when they "need" it to work. There can be a "desperation energy" present with many clients. The situation can put immense pressure on you to deliver overnight miracles. We as agency owners also generally do a poor job of letting clients know the time, cost, results, and communication.

Partnership – *Clients have almost no expectations* because you're not really promising anything except for a small test. Anything you generate is seen as a bonus. If you win, clients are stoked. If you lose, they didn't expect much anyway. Expectations are still important but you can get away with not setting any. You have far more wiggle room for error.

If you want to learn more about this type of agency, join our free Facebook group called "Beyond Agency Profits - Agency Lifestyle Design". If you're not already there, get your butt inside. There are tons of agency goodies like free trainings inside the group about scaling while going phoneless and meetingless.

beyondagencyprofits.com/group

By the way, neither agency type is right or wrong. It depends on what you want in life. There are pros and cons to both.

The Biggest Downsides To Each

The biggest downside to a traditional agency is *clients see you as "working for them"*. They'll want lots of meetings, reports, and proposals. This makes it really hard to really be free. The more success your agency has, the more it will become like a "high-paying job". If you just want the "laptop lifestyle" and don't really love building backlinks or dicking around all day inside an ad manager, this structure can prevent you from really being autonomous and free.

I used to always feel like my phone and my laptop were my "electronic leash". A traditional agency is one of the hardest businesses to completely automate and outsource. A few of the most successful agency owners on Earth have told me "this business is not scalable”. Though it absolutely can be scaled, it is by no means easy.

The biggest downside to a Partnership Agency is *you are the one taking all the risk*. If you don't know how to choose the right clients, this can be catastrophic. You will do a lot of work and never get paid for it. There are a lot of pitfalls in choosing the right clients. There are too many to list here. You manage that risk by testing small and by taking clients on a small ‘first date’. You learn most by working together with them.

The Biggest Upsides

The upside to a traditional agency is you end up with *monthly cash flow that adds up quickly*. Just a few good clients means you'll earn more than most people do with a high-paying salary. In my first agency in 2007, it took me just 5 clients at $1k/month to earn $52k/year. I was beyond thrilled to not need a “real job” ever again. It doesn't take a lot of those deals to move the needle.

The biggest upside to a Partnership Agency is that it has nearly *unlimited income-to-time leverage*. Campaigns that work for one client are easy to slightly modify and use again and again. Rinse, lather, repeat. You get to "do work once" and get paid for it over and over. It has a higher upside. You aren’t reinventing the wheel with each and every client. This creates leverage that makes it easy to grow.

Of course, you can do hybrid deals as well. You can get creative and use aspects of a traditional agency and also have profit sharing opportunities. *There is no box and you can do whatever makes sense for <u>you</u>*.

Ask for a retainer and a share of the results if you like. Anything is possible.

Which is right for you? It just depends on what you want. If you love doing ads and building backlinks or you are not a big fan of risk, go the traditional agency route. It will make more sense for you. If you just want to help worthwhile businesses make sales, live free, and earn a great living, a Partnership Agency may be a better path. The choice is yours.

Chapter 8: Absolutely Rocking Client Results

Imagine that each and every client was blown away with the results you got for them. They thanked you, asked if you could help them more, and referred you to their colleagues and friends. This is totally possible. It comes down to changing how you generate results for your client. How do you get clients results now? There are only ever three ways you can help your client have a bigger payday.

1. Get more new people.
2. Help them increase their transaction size.
3. Sell more frequently to their customers.

Here is a critical difference to fully integrate. Every business *thinks* they need “new people”.

They don’t.

Old cash pays the same as new cash. Old cash is a heckuva lot easier too. Old cash works a lot faster too. Old cash is tried and true. Plus, more importantly for you, getting new people is where all the competition is. It’s also the hardest way to get results for clients. Over 99% of agencies are focused on getting new people. It requires bringing new resources to your clients that they don't already have.

Why go after "new"? It's because that's what most clients directly ask for. However, it's important to understand that "new" is always the least efficient way.

All the real money is made in retaining and up-selling. Dan Kennedy says, "The purpose of making a sale is to acquire a customer." Most people have it all completely ass backwards.

"The Purpose Is *Not* To Make A Sale, But To Get A Customer. Peeps Sell Their Products Or Services And *Throw Their Customers Away*." - Travis Sago

Most people don't realize it, but the most powerful asset in any business is *the relationship with the customer*. A good customer list is solid gold. Nurture the relationship properly and you will always have something and someone to sell to forever.

Let's illustrate the power of this principle with an example. Imagine you just signed a new client named Dave. Dave runs a typical American restaurant. Naturally, Dave wants to make more money. The first thing Dave thinks is "I need more new customers". Remember though, new customers is *just one possible way* to increase Dave's cash flow. It's an idea Dave believes. Though if Dave wants to achieve results quickly and easily, it's probably the wrong approach.

For example, my last girlfriend used to be a real Groupon junkie. If you're not familiar with Groupon, it is a coupon app that offers deals on businesses with virtual coupons. Much like a physical coupon book, you can use Groupon to get deals of up to 50-70%. Lots of restaurants use Groupon to attract new customers. She would surf Groupon and we would go to all these new restaurants. We were new customers, exactly like Dave wanted. More often than not, we would try Dave's food once and only once.

It really sucks for all the Daves out there because he gives 50% off his regular price. On top of that, Dave gives another 50% fee to Groupon. Dave is lucky to get ¼ of his normal price. On a $50 meal for two, Dave might collect $12.50. Dave still has food cost, overhead, and staff to pay for. Dave is losing money to try and bring in a new customer in the door. It gets worse. *Dave actually has a much deeper problem*. Because what Dave really lacked was the ability to bring his customers back and add more value.

In visiting over 50 restaurants, no one had a single strategy to retain and up-sell us. They just "hoped" we liked our cheap meal so much that we came back on our own. Hope is not a strategy. Like most customers, we just got busy and forgot. Even the restaurants we liked, we didn't become regular customers of.

Here's why this matters.

Dave Doesn't Know *What Dave Actually Needs*

Think about this. Because you're likely the one responsible for improving Dave's business. Most of the Daves of the world would hire you and tell you that what they need is "more new customers". That would only make the *real problem* worse.

Imagine instead that you intervened and helped Dave be strategic. You asked Dave if he's open to trying something different. You had a small idea to bake him a bigger pie. Dave likes pie and since it's no risk, he agrees to a small test.

You realize your real job is to help Dave keep his customers coming back. At each table you put a sign that says, "Want 10% off your meal today? Join our special VIP customer list. Just 'text VIP to 12345' and you'll get a 10% off coupon for your meal today. Thanks for coming into Dave's American restaurant." Even better, you raised Dave's prices 10% so the discount didn't affect that bottom line. It's just perception anyway.

Each week you texted out new offers to Dave's customers. Free dessert this week. Lunch special next week. Half price appetizer next week. There's a cooking class Sunday morning. There's a band playing on Friday night. You kept adding value and giving Dave's customers endless reasons to come back.

From a delivery perspective, your job is easy. You're just creating a simple offer to invite Dave's customers back. You're just typing a few lines in a text message. If you did this right, Dave's average customer is eating there once per week, sometimes more. Of course, this process wouldn't just work with one customer. Now Dave has regulars who are dropping in once per week. Dave is stoked.

Dave smartly built a list of his most valued customers. You controlled it. That means Dave is no longer dependent on any third party service like Groupon, Google, or Facebook. Dave doesn't need all that ongoing ad cost just to chase the new girl at the dance.

Now you recognized that there is another opportunity to increase profit margins. Dave's average transaction value. You helped Dave to add some extra value up-sells. You came up with more and more simple reasons to make Dave's restaurant cool. Some ideas worked and some didn't.

Dave offered extra drink specials. Then he offered a 3-day cooking class. Dave created a take out lunch special for busy professionals that's ready for pick up in 10 minutes. Dave catered local private weddings and special events. Dave became an affiliate for their recommended cookware if customers want to cook like Dave at home. The possibilities for him are limitless.

Imagine because you kept adding value, Dave's average customer also spent twice as much money each week. Customers spending more became normal for Dave.

Here's Where The Money Math Gets Interesting

Most of the Groupon restaurants we went to only 1x. A few earned a second visit. None of them turned us into repeat customers. Nobody up-sold us anything. All in all, we spent less than $100 total with every single restaurant. The experience was a real world "case study". Imagine instead those Daves got your help. You focused on the two key leverage points of up-selling. and creating regular repeat buyers. You ignored Dave's false belief that he needed more new business.

Because you did a good job, Dave's average customer would spend $100 per week for the next year. In just one year, repeat customers spend 100x more than the average one-and-done customer. At $100 per week, a typical person spent $5200 for the year. That's just in year one. What if those people stay as happy customers for 10 years?

Now let's look at the money math once again. A single visit Groupon customer is worth $12.50 to Dave now. That's his take home before he gets violently raped and pillaged by Groupon. A weekly customer, with a little extra value added, is worth $5200 per year. Which would Dave rather have? A $12.50 one time customer or $100 every week? See the difference between a one-and-done $12.50 customer and a $5200/year customer for life? What does that difference do for your client Dave?

Now you may be thinking this doesn't apply to you because your clients aren't restaurants. This doesn't just apply to restaurants. These principles are true in every business, including your business and your client's business. Even if you never work with a restaurant, your business operates under these same principles. In fact, all businesses operate under the same principles.

New, New, New Business = Hard Work, Low Pay
Retain, Up-sell, & Value = Easy Work, High Pay

Dave doesn't know what he really needs. Because what businesses *really* struggle with is actually making offers to up-sell and keep their customers. Here's the kicker for you. It's way easier to retain and add value. It's just that nobody thinks to do it.

After all, what's harder? Getting a stranger to get dressed, drive in their car, sit down and wait 30 minutes, and try some food they've never tried? Or is it easier to offer a drink special to Dave's customer and up-sell someone sitting there right in front of him? Customers are easier because the relationship is already there. The sales hurdle is much lower. They already like, know, and trust the business.

Even businesses that seem "transactional" on the surface aren't. It's only because the owners treat their customers like a transaction. It's only because those Daves and Debbies see their customers like another name and number. It's always the *relationship* that really matters. That is the key leverage point with which you can yield your magic.

What If My Client's Biz Is Only 'One Time'?

There is no such thing as a "one time sale" business. It just seems that way. For example, lots of personal injury lawyers used to tell me their business was transactional. Though it's actually not. On the surface, it made sense. "My clients don't need me unless they've been in a car accident. That's why my business is transactional. Once they've used our service, there isn't anything else we can do."

After working with the top lawyers in the world, I noticed a pattern. The most successful lawyers always marketed to their past clients for referrals. They never stopped building that relationship. This little strategy made a huge difference. They would acquire one client through advertising and that one client would turn into 2-10 referral clients over the next 10 years. Those new referral clients didn't require expensive ad costs to acquire. Those referrals happened intentionally only because they kept investing their resources into their client relationships *after* they had already done business. Even long after their "transaction" was done, they followed up.

Not surprisingly, those lawyers had far more money to spend on marketing to get new clients. Because they are retaining and adding value, they have far more front end ad budget to get new people.

Secrets Of The Big Shot Lawyers

I've gotten a chance to work with all types of lawyers, including the less marketing-savvy ones. I would often hear new lawyers say, "Lawyer X spends millions on TV ads. I could never afford that." They always assumed the other lawyer's "secret" was that they had deeper pockets. This was true on the surface. Those lawyers did have deeper pockets. However, it was true because those lawyers continued to contribute to past clients. That's where the extra ad money came from. Because each client was more valuable to them, it gave them a spending advantage.

Years later, I got to consult with many of those top Lawyer X types. He was always willing to spend everything he had to get a client. Many of them would literally spend $6000 to get a $6000 client. He did that because he knew every client would bring 2-10 referrals later. He knew those referrals did not have an advertising expense. He saw the bigger picture. He could spend more on his front end because he had a sophisticated back end. Because he was better at retention and adding value, he could outspend everyone only focused on "new". *Money goes where it is most easily welcomed*.

Being Strategic > Being Transactional

Most businesses sell the product or service and throw the customer away. *The real purpose of the sale is to get the customer*. The first sale should be a hello, not a goodbye.

Now back to your clients. What happens with your clients who really believe that they need 'new' business? What happens when "new" is what they're willing to pay for? You almost have to politely ignore their opinion. If they knew how to solve their cash flow problem, they would have already solved it. They don't actually need more new. They just think 'new' is what will solve it. Adding more "new business" is like pouring water into a leaky bucket. It will just show you all the holes in your bucket. Fix the bucket first.

Chasing "New" Is The Hard Business To Be In

The more your agency helps clients retain and up-sell, the more you can generate easier and faster results. Those results also last longer. When you are the one generating results at will, you get to pick and choose who you want to work with. Later we will discuss using the right strategy so you will also generate a controllable, leverage-able asset. We'll cover why getting assets is a 30-year wealth shortcut.

My $100,000 Client Accident

I wish I could tell you I discovered this next secret because I’m some sort of all-knowing marketing genius. In reality, it was a happy little accident that only Bob Ross could fully appreciate. Here’s how I discovered how much easier and more powerful retaining and up-selling is. Carl is a lawyer in South Carolina. In 2016, we were running Facebook ads for Carl. We had spent probably $7,000 - 8,000 in ad spend over 2 and ½ months. When you added in our fee, Carl had invested somewhere around $14-15,000 in total. I was feeling really stressed out because we hadn't gotten results for him.

At the same time, I was speaking at an event for one of the big personal injury lawyer organizations. The event was an intimate little internet marketing bootcamp in Atlanta, Georgia. It was 3 days long and there were 2 other speakers. I was presenting for about 50% of the event. About 20 lawyers were scheduled to be there. We would all be close enough to rub shoulders and stare each other in the eyes.

Carl had bought himself a ticket. I was filled with dread at the thought of seeing him. I was stressed because I hadn’t gotten him any results. I was sure he would tell everybody that I'm a fraud. “Don't listen to this guy. He doesn't even know how to run ads. He wasted $15k of my money.”

I was prepared for the worst. Lynch mob. Torches. Savage beatings. My death would be short and abrupt. Except my execution never came. Much to my surprise, Carl greeted me with a giant excited bear hug.

Carl is a large man and I'm a skinny Canadian. There was nowhere to go to escape that enveloping bear hug. The first thing he said to me, "Do you know I made $100,000 from that campaign you ran?"

Excuse me? I was downright shocked. My jaw was on the floor. A hundred grand? I thought it couldn't be true. I was watching his ads like a hawk. Every day I was tracking his numbers and I was sure we weren't making him money. Still confused, I thought about it for a second time. I was inside his ad manager on Facebook every single day. We were tracking everything. I knew he had invested significantly with us and we still had nothing to show for it. I was agonizing over my lack of results daily. I was a hundred percent sure our ads had not made his phone ring. Nothing was working yet.

Carl snapped me out of it. "Yeah, remember that little referral campaign you sent? I got three clients. One of them is a really big case. It's going to take a couple months to settle, but I'm going to make about a hundred grand."

Honestly, I had totally forgotten about our referral campaign. One of the challenges working with personal injury lawyers is that Google ads are extremely expensive. Of the 100 most expensive keywords on Google, 78 of them are injury lawyer keywords. When you're paying $200 per click, a lawyer can get 5-10 clicks before their monthly ad budget is gone. We were running Facebook ads because they were a lot more affordable. We could get clicks for $1 or so. The problem was people don't shop for an injury lawyer on Facebook, so the ads took longer to work. We couldn't really target people who had been in a car accident through Facebook ads. On top of it, Facebook doesn't let you just say, "Hey, have you been injured in an accident?" There were a lot of handicaps on what we could and couldn't say.

I knew we needed some time to get Carl's funnel working. As a way to give him a quick little bump, I decided to send out a really simple "referral campaign" to his past clients. The campaign wasn't meant to save the world. I just wanted to get him a client or two so it bought time to get the ads working. I figured if he had a client or two, he would relax and trust us. I was not trying to create a "Beyond Agency". I just didn't want Carl to cancel his ad campaigns right away like a few other lawyers had done.

Eureka! Hot diggity! The Campaign Worked!

Carl was over the moon! Here I was busting my ass testing hundreds of targeting, copy, and ad creatives. I was desperately trying to make his phone ring. Instead, a few poorly worded emails made him 6 figures in a couple days. *It couldn't be that easy, could it?*

Turns out it can be that easy. I realized that it's way easier to help people multiply what's already working. It's way easier to add value and retain.

What did we actually do? The referral campaign was a 4 part email sequence. Our little referral campaign went like this. “Dear past client, thank you so much for being a past client. We appreciate you. I know we don't reach out to you enough. We want to be your trusted advisor for life. That's why we have a toll free phone number. If you or anybody you know has a legal question, we're happy to answer them for free. If we can’t help you, we’ll find you somebody who can. This is just a special VIP service that we're offering to you as our valued client. Call us first. Once again, it’s free.”

It wasn't brilliant but simplicity worked. In fact, usually *simple works best*. The reason the campaign worked is because businesses are notoriously bad at marketing to their past customers and clients. In Carl's case, he had decades of clients that *he had never once reached out to*. He had loads of happy clients who just needed a gentle nudge.

It’s not like we discovered a unicorn. These results are not at all uncommon. Only about 1% of lawyers have contacted their past clients. The few that do just send a boring legal newsletter. Less than 0.1% have done it correctly.

Most times businesses think, “They already bought my thing. I don't know what else I would sell them.” Celebrate! Because that belief will make you a lot of money. By the way, you can also download for free this campaign template and other bonuses at beyondagencyprofits.com/template. No optin required.

Therein Lies The Secret:
Say Thank You + Add Value

It’s easy to just keep it simple. Because all you have to do is say “thank you” and offer their customers some kind of extra value. That's it. It doesn't need to be any more complicated than that. No funnels. No 12-step webinar complete with retargeting sequence.

Imagine how you can help your clients make a hundred thousand dollars too. The other beautiful benefit is that the results are relatively instantaneous. Clients don't have to wait months and months of paying for ads to hopefully get a result. I used to need 12 months to produce tangible SEO results in a big competitive market. In 48 hours, clients know your stuff works. If it doesn’t work, that’s useful information too. It usually means their customer relationship just isn’t there. In which case, you dodged a bullet. You don’t want clients who don’t treat their people well. You don’t want partners who people would not do business twice with.

In a Beyond Agency, that’s why you try a first date before committing fully to a client. It’s for your benefit as much as theirs. You don’t want to get married to deadbeat clients before they’ve earned your trust.

Offer Their Biggest And Best

This strategy works even more powerfully if you can sell their highest end $100 bill services. For example, if you were working with a local dentist, getting a few extra $25,000 cosmetic patients is going to do more for him than getting dozens of new $100 checkups. If you have a coach or consultant, selling a package of three calls for $100 isn't going to be the same as if you get somebody in their $25,000 per year mastermind.

Ideally you want to say thank you and offer their *biggest* packages. What you'll find is they're actually pretty easy to sell. Because if they've done their job right, their customers already like, know, and trust them. The relationship is there. They want to buy more.

If you can’t think of what else to offer, ask for referrals. If you want to generate referrals for yourself and your client, it follows the same process. The easiest way is to say thank you and offer extra value. For example, one of my clients built a 7-figure Facebook ad agency at 17 years old. They sent their clients a personalized Facebook message that said, “I appreciate you. If you have somebody else who has a Facebook ad account, I'd be happy to give them a free account audit.

This audit will give that person a couple of ways to improve their ads. Usually we can save them 10-20% of their cost in just 10 minutes. There's no obligation. If they want to work with us, we will work hard to make you look good. Even if they don't work with us, they'll get some value out of the audit. The free audit will give your friends a couple of good ideas that'll help them lower their ad spend and improve results. We would normally charge $500 for this type of consultation. It's just my way of saying thank you."

That's the power of saying thank you and adding strategic value. Most times we make business more complicated than it needs to be. It doesn't always require long, complicated funnels. In most cases, funnels are trying to pour more water into an already leaky bucket. Getting results means adding more value to the relationships that are already there. Inside every business there is an existent flow. We don't try and create flow where it does not yet exist. Harness the flow that is already there.

If you'd like to download this $100k email template, just enter your name and email at beyondagencyprofits.com/template. Before you go and read the next chapter, be sure to grab yours.

Chapter 9: Low Maintenance Clients Who Are Thrilled With Results

First Big Agency Evolution

Around 2012, we first tried a new agency model. Today this model is called “rank and rent”, though it didn’t have a name when we were pioneering it. This model was exciting because we didn’t have to wait until clients hired us and we could try more “gray hat” ranking methods. We had gotten really good at ranking in Google. We realized we could rank videos easily. We were mostly keeping this video strategy to ourselves because we never wanted to do anything “gray hat” that might get a client in trouble. Once we got our videos ranking, they generated phone calls. We would then rent the phone calls to relevant businesses. We fumbled and bumbled through it and made lots of mistakes. But overall, the idea was a win. Why? Because it meant a few things.

1. We Could Choose Easy Wins.

Before we did this strategy, SEO was a long tedious process. We had to try and get clients number 1 for all their most difficult keywords. Now we only picked fights we knew we could easily win.

We no longer had to go after very difficult keywords just because our client "wanted to be number 1". We could sometimes rank a video #1 in a few days. How? Because we just avoided difficult 12-month ranking battles altogether. We only chose easy keywords to rank. Plus we could try lots of things to rank faster that might normally get a client in hot water. Admittedly, part of it included spammy automated backlinks. Sorry Google. At the end of the day, we controlled the client flow. The top ranking and video were our assets. When we wanted more business, we could just make and rank another video.

2. We Didn't "Work" For Anybody.

Before we had lots of "client-underling" relationships. This time around we had no boss. This meant no reports, no pointless meetings, and no accountability. We controlled the relationship 100%.

After signing a client, I was no longer tethered to my email and phone. Before they were hiring us to try to get to number one in Google. Now they weren't hiring us to get a result. We already had the result. They wanted a piece of the results that we already controlled. We just *leased* our phone calls to clients.

3. Most Importantly, It Was Leverage-able.

If a video worked one place, with a little minor tweak it worked again elsewhere. We could basically use the same video in 100’s of different markets. We could use the same video in the same market for different keywords. We didn't have to reinvent the wheel month after month. This was a big upgrade. Before we were constantly trying to turn client’s broken funnels into winners. Every client situation was unique. Now results were copy and paste. What worked for one roofing company in Detroit worked for another roofing company in Boston. We had leverage that we had never had before. That's what a Beyond Agency is really about at its core. Do something once and let it work again and again for you. Since then, we’ve helped other agency owners and freelancers to change their approach. Let’s talk a little about the results.

Dan Signed A $482k Deal

Dan [redacted] My clients think I'm just a nice northern Christian boy, think I should mail em' hannukah cards this year? 😂 deep south Gents.

"Feel, felt, found" has worked incredibly.

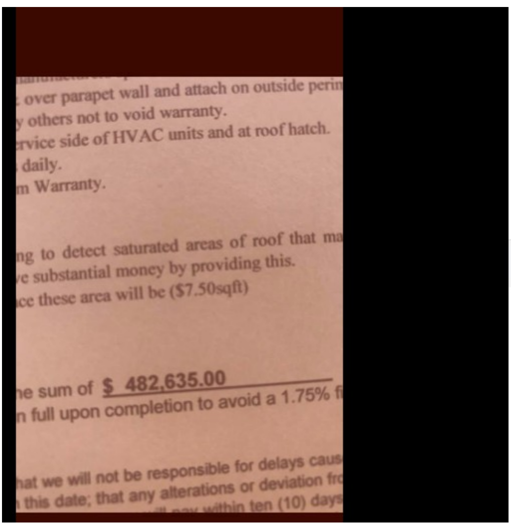
Honestly everything worked from the mastermind 🤩...including the concept of focusing on the high ticket niches (like roofing vs pest control). Frankie Fihn You were damn right about finding the 1% we can help.

Instead of going after the 99% of roofaz, the magic has been finding the 1% who are entrepreneurs who get it, and all I have to do is give them a tiny push to the finish line instead of building a redneck's biz from the ground up. The guys who have 3 offices and 1 mill marketing budgets already.

The heck with 7 figures, let's hit 8 🤑🤑🤑!!!!

Love · Reply · 2h · Edited

❤️ 1



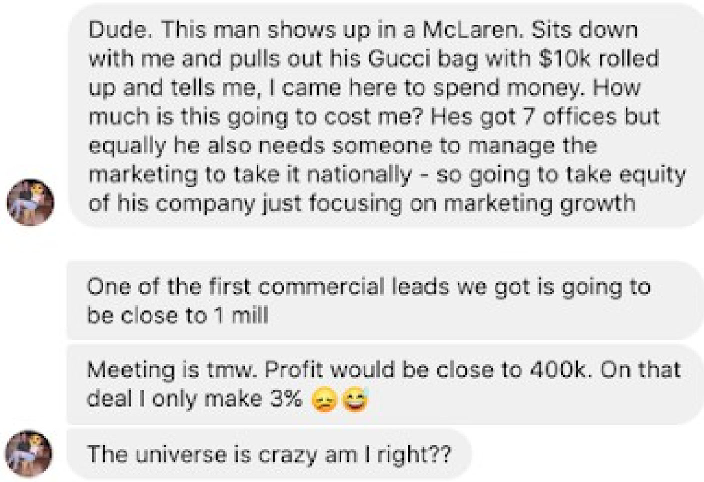
Dan [redacted]
2 hrs · Edited

Newest fun

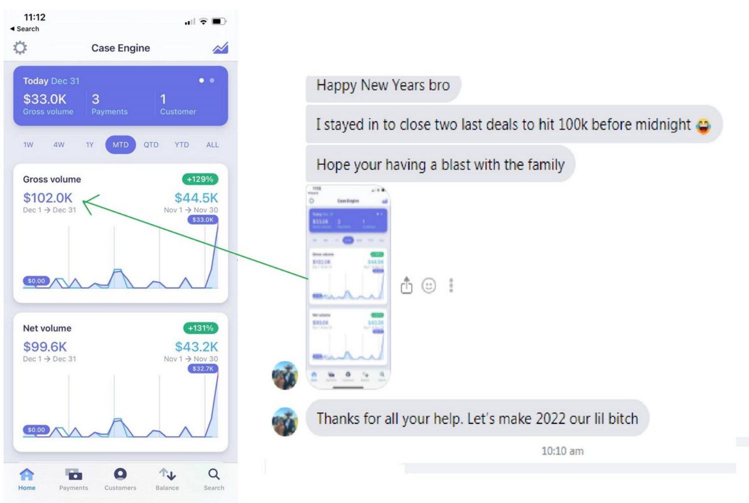
❤️ Frankie Fihn

Love

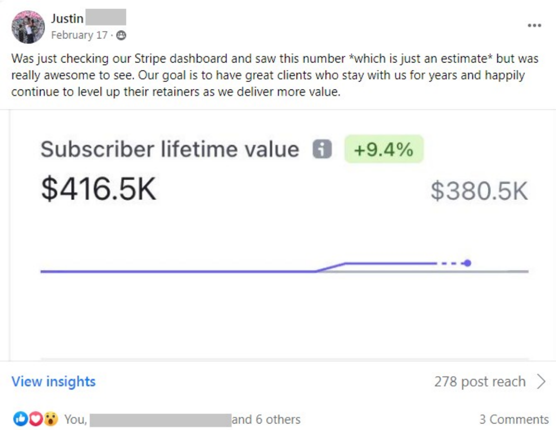
Write a reply...



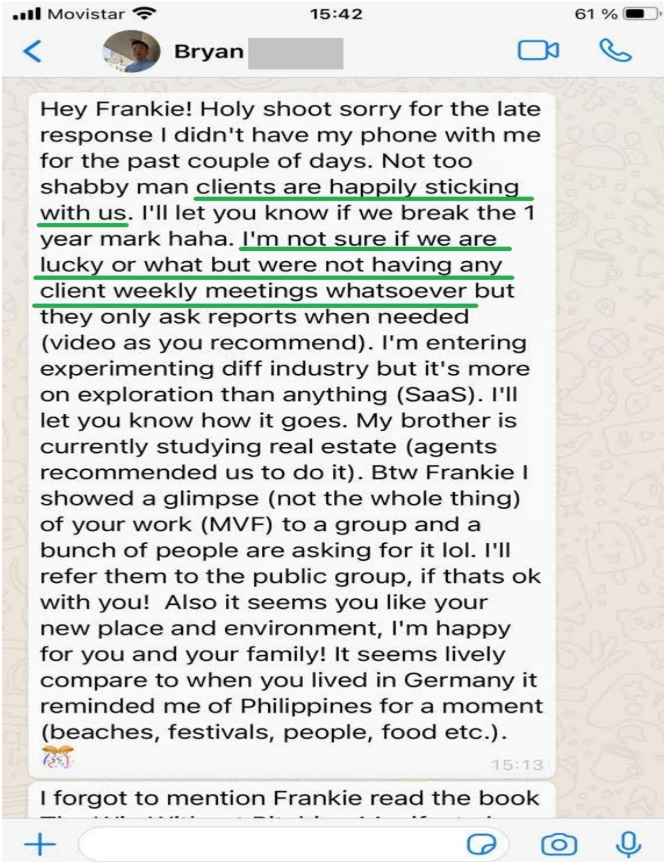
Cyle Had His First $100k/Month



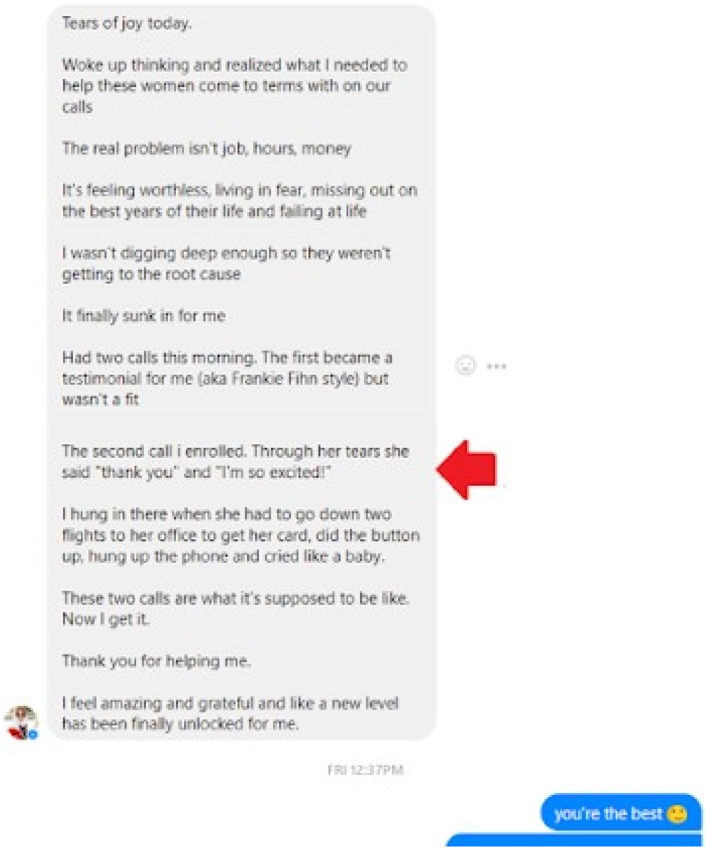
Justin's Average Client Went Up To Over $400k



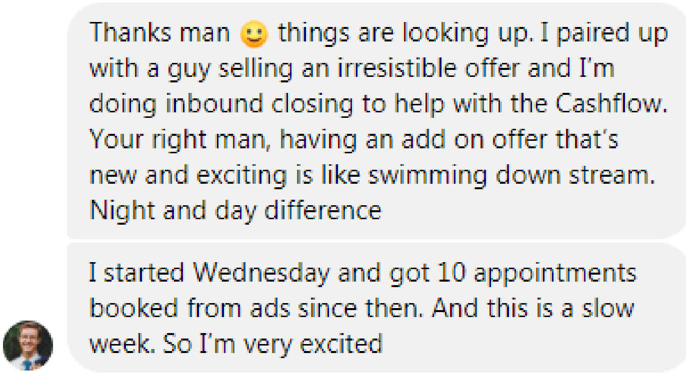
Bryan retains clients without meetings



Kate Has Her First $25k Week



Jarin's Sales Downstream



Thomas Signs Two $100k Recurring Clients

Reminder: If you're not yet in the free Facebook group Beyond Agency Profits – Agency Lifestyle Design, get your booty in there. It won't be the same without your fine ass inside. I swear that's not as dirty as it sounds. You'll discover how we're signing $1k-10k/month clients without a phone call using 5-minute Loom videos that do the selling for us. Plus other goodies.

beyondagencyprofits.com/group

A Small Disclaimer

Of course, I'm not "promising" you these same results. You're a unique human being with your own skill set. I just want to show you what's *possible* when you apply the power of these timeless principles. Now here's something else that will save you untold amounts of client headaches.

First Dates Vs Instant Marriage

Imagine for a second a man would like to meet his future wife. He cruises around some night clubs looking for Mrs. Right. Every time he sees a pretty stranger, he asks to get married. He keeps doing this to stranger after stranger. What do you think will happen?

Probably a whole lot of nos. Perhaps a few laughs, maybe even a drink to the face. Why? Because it's asking too much too soon. It goes against the normal psychology of how humans bond and form relationships. The normal process involves first getting to know someone, going out on a few dates, and continuing forward if it's mutually a fit. Even if he gets a yes, what happens when it's totally the wrong fit? What happens when he ends up married to a nightmare partner?

Running an agency is no different. Human psychology is the same everywhere. Above all, *business is relationships*.

Here's why that matters. Most agencies offer "marriage" right out of the gate. "Pay me thousands every month and I'll generate some leads during that time." You commit to the relationship long term before even knowing if it's a fit for everyone involved. That's instant marriage. It backfires a lot of the time.

Some clients won't respond to 4 appointment reminders and then cancel on you last minute. Some clients have no boundaries and want you to respond 7 days a week to emails. Some clients complain or haggle on price. Some clients only want to discuss price before discussing anything else. Some clients don't or won't pay right away. Some won't pay at all. Some clients will ask about your refund policy and guarantees before we even know if it's a good fit. Some clients have no real goal in mind at all. Some clients have red flags like firing 5 experts before you and think they were all terrible. Some clients have unreasonable expectations and ask for things like ranking on page 1 of Google in a week. Some clients ask for a free month because they were burned in the past, even if it's their fault. Some clients have perpetual, constant, high turnover. The point is that you'd rather know right away a client is a bad fit than fight about "bad leads" with a refund dispute 3 months in. These are just a few reasons *we don't want to insta-marry every client*.

What happens if that client is a huge pain in the ass? What happens if it turns out a client is a lot harder to generate results for than you originally thought? Most times, if you marry the wrong client, you just grin and bear it. You're stuck. They're stuck. You're in a crappy marriage together. Divorces are ugly.

A better way is to work together as a "first date". It's a small commitment to feel each other out. That way you get to see if it's a fit for everybody involved. It's way easier to back out of a first date that didn't go as planned. This protects you from getting married to the wrong clients. The wrong clients will suck the life out of you. I've found that if you have 20 clients and 2 are nightmare clients, when your head hits the pillow, it's the 2 unhappy ones you're stressed about. It's a lot easier to just never marry that client in the first place.

Plus, a first date makes your client acquisition job easier. First dates are a lot easier to sell. What is an easier yes? Pay me thousands of dollars for 12 months or why don't we run a campaign for 7 days and if there are enough results we can talk about next steps?

A powerful offer and a first date work together. You get to control your fate. When you feel out your clients first, something powerful happens. You become the *selector* instead of the *selected.* You choose the right clients for you.

Becoming The Hunted Instead Of The Hunter

An agency without control creates slavery. Most freelancers and digital agency owners have money or time but not both together. For them, cash and time is an either or proposition. When they have money, they have no time to enjoy it. When they have time, they are usually broke or severely underpaid. When you are the selector, you get to have money and time together. You get to build an agency that not only helps your clients but also gives you the kind of lifestyle you've dreamed about. Your impact, results, and leadership will up-level dramatically. You work less as you earn more.

Chapter 10: Easy Happy, Low Maintenance Clients

You will only ever have four types of clients.

1. Low paying - High maintenance clients
2. Low paying - Low maintenance clients
3. High paying - High maintenance clients
4. High paying - Low maintenance clients

All of your clients will roughly fall into one of these four categories. We create a more enjoyable business when clients fall into category 4.

What happens if you have bad clients right now? What about low paying and high maintenance clients?

Fire Them! Yes You Can *Fire* Clients!

Want to eliminate 90% of the headaches in your agency? Fire your low paying, high maintenance clients. If you think you need their cash, you don't. The loss of revenue is usually minor. However, the gain in sanity is astronomical. These clients are a drain on energy and time, which are far more valuable than the little bit of money they pay you.

I remember my worst client. It was a husband and wife team. One of them talked down to my staff. She demanded $40,000 worth of work for less than $1000. She wanted miracles daily. It was never fast enough or cheap enough. She demanded frequent meetings and phone calls, usually everyday. If we took 2 hours to respond to an email, she bitched at how that was unacceptable. She didn't answer her phone and then blamed us for bad leads. It's hard to articulate just how condescending every interaction was. So we fired her! It was one of the freest moments in my agency. My assistant Terence actually did a little celebration dance. We gave them a refund and moved on.

Another bad client was the kind of person who wouldn't have walked to the mailbox to pick up a $100,000 check I sent him. He had a 12 minute voice greeting that chased off any interested leads. "Press 1 if you would like to speak to a representative. Please hold. Your call is important to us." Of course, he blamed our leads. Bad clients usually blame you for things they do themselves. Our leads hung up because they had to wait 12 minutes and push 7 button combinations to speak to a human. Often their system would disconnect you after the long automated wait. They refused to fix it and insisted lead quality was the problem. You just don't need clients like that in your agency. Be willing to let go of any client who is more headaches than they are worth. Raise your standards.

The Secret Weapon That Eliminates 90% Of Client Problems Before They Happen

It's setting proper *expectations*. Have you ever found that the hardest part of running an agency is by far the clients themselves? This next section will make dealing with clients exponentially easier.

Why do bad clients happen? What causes an unhappy client in the first place? What is the source of all those headaches, frustrations, and problems? More importantly, what is the one thing that makes them go away before they even happen?

It's not what most people think it is. Most people think it's getting better results. It's not just results. You won't keep clients without any results but it's only part of the equation. About 10% of clients will be great clients because that's just who they are. About 10% of clients are bad clients because that's just who they are. The other 80% will go either direction based on *how well you calibrate their expectations*.

A good friend owns the biggest ad agency in Europe. He spent a few $100,000 hiring the best ad team in the world to get better client results. They achieved it. Client results were outstanding. He was shocked when he still had the *same client complaints* 3 months later.

Because it was not just about *results*. It was about *expectations*. What results were they *expecting*?

Setting Expectations So Everyone Wins

To run an agency where clients are consistently happy and referring regularly, you want to be a master of setting proper, realistic expectations. For example, I remember my friend saying, “It's like I have 160 different bosses.” He kept investing heavily in making his team better. He worked harder and harder to get better client results. He kept getting them more leads, scaling better, and lowering their ad costs. Still he had the same complaints!

His best client went from $10k/month to $400k/month in just 90 days. That’s a hell of a result! Then that client did the unthinkable. They fired him! Nothing says “thank you” to an extra $390k per month quite like a pink slip. The other clients getting lesser results were still mostly unhappy. He couldn’t seem to please anyone. They wanted meetings, explanations, text messages, email responses, etc etc.

It wasn't until he realized that the big underlying problem was actually the *client’s expectations*. If you set your client's expectations right from the very beginning, it builds trust. Trust is what makes clients relax so they let you do your thing. Everything goes much smoother with trust. Trust comes through a foundation of proper expectations.

The Five Key Areas Of Expectations.

1. **Results:** What specific results are you going to get them? How is that success measured?

2. **Time:** How long is it going to take?

3. **Cost:** How much money do they have to spend? What are all the costs involved?

4. **Communication**: What are you going to communicate and how often?

5. **What I Need From You:** What information do you need from the client to be successful?

All problems of expectation happen in one or more of these areas. Happy relationships happen when you're on the same page about these 5 areas. When you specify all 5 of these variables in advance, it removes the mystery and anxiety for clients. Your clients actually understand *what you're really doing* for them. That's when the trust flows.

Specificity = Patient, Happy, Grateful Clients

Here's the key. We must be *specific*. It is better to say "$5 webinar registrations in 30 days" then "we'll get more clients". The clearer and more concise we set expectations in those 5 areas, the easier managing our client becomes. What we're really doing is r*emoving the uncertainty* of the future of working together. In our line of work, the vast majority of client headaches happen because we simply weren't on the same page with a client. Client headaches are almost always *problems of expectations in disguise*.

What You Thought vs What Your Client Thought

Imagine this scenario and compare these two totally different points of view. A new accountant client hires you for Facebook ad services. You're stoked to see a new payment in your Stripe account and someone cool to work with. You ask for their website logins and get access to their ad accounts. After a little back and forth, you've set up all the necessary pixels and tracking codes.

They've hired someone to run other ads before but never on Facebook before. They liked Google but thought it was too expensive. They're excited at the idea of getting cheap clients. Together you are starting your Facebook ad journey from absolute zero. The client has no working funnel, their website is old and frankly pretty shitty, and their messaging sounds like every other accountant in the area.

First, you come up with an idea for a good lead magnet. Since this offer has never been tested before, we hope to get $8 leads. With leads that cheap, you figure everybody will be really happy. You set up your first test ad and target other local business owners in the area. Much to your surprise, the ad starts bringing $4 to his email list right away. This is a huge success! You are already getting results right out of the gate.

Two more weeks go by and you get an email from your client. They sound frazzled. “I just got a $500 bill from Facebook on my Visa and I still don’t have a single paying client. Can you call me right away? Can we pause our ads?”

Of course this scenario is just an example. However, it happens every day in the real world. Where did it all go wrong?

- **What you thought:** My client hired me to get cheap leads. I helped them get $4 leads right away. I am doing a great job.

- **What your client thinks:** I believe ads are binary. They either work or they don’t. I don’t see what running them longer would do if they aren’t working now. I don’t understand refining and testing. All I know is I got a $500 bill and I still don’t have a single client. The ads are not working. I knew I should not have trusted another ad person. I didn’t even receive a single phone call. You are spending my hard earned money. I didn’t want “leads”. I wanted clients!

Here’s the thing though. It’s not because the ads didn’t work. At $4 per lead, they’re working great. It’s because the expectations were off course. Remember, these are 5 key areas of expectations.

1. Results
2. Time
3. Cost
4. Communication
5. What I need from you

Unfortunately, we missed the mark on all five. Even though we got cheap leads, ‘cheap leads’ are relative to what the client expected. They’ve never run Facebook ads before. They don’t know what’s a good or bad lead cost. They’re not “cheap” to the client, especially if he doesn’t yet have a paying client to show for it.

What could we have done *differently*? Imagine before we ran a single ad, we sent our new client a one page PDF document. The goal was to get everyone on the same page. Before we hit go, they signed off on it. The document said something like this.

What You Should Expect In Our First 30 Days Of Working Together.

Results: You have never run ads before on Facebook. We are starting from absolute zero. This means we are beginning this process without a working offer or funnel. A big win in month one would be to get leads for under $10 a piece. We will be testing a lot of angles to find out what your customers respond to. Our ads will probably not magically land you a client on day 1.

However, this is a normal part of the process. We will continue to nurture every lead we get. Remember that many leads we get today will convert into phone calls 3-12 months down the road. It may not look like "immediate sales" but this is tremendous progress. Please stay patient during this process.

Time: We expect to be able to generate leads within the first 10 days.

Cost: We will be spending up to $1000 this month. This means you will probably get a bill from Facebook after the first $25 in spend. They often bill in increments of a few $100. Don't be alarmed when you see multiple small charges on your credit card from Facebook. These costs are an investment today to ensure future business tomorrow. Remember that $10 is a small price to pay for someone who could become a $10,000 or more client for you.

Communication: We will send you a full report at the end of the month. Here's an example report that shows costs, what we tested and why. We typically do not do phone meetings, though we're happy to answer your questions over text. We typically respond within 48 hours.

What I need from you: We'll need access to your Facebook page and business manager. Here's a link that will walk you granting access.

Can you please sign off below that you read this? I want to be 100% sure we are on the same page.

By the way, if you're still making proposals, these are the same 5 things you want to include in them.

When Should You Calibrate Expectations?

The best time to set expectations is *before we begin*. During the sales process. Even before a client gets their first bill, their first report, or their first campaign goes live, we calibrate their expectations. If we try to calibrate expectations later, explanations often sound more like "backpedalling" and excuse making.

For example, I once got on the phone with a big shot lawyer who had a phone team of 10. He told me emphatically that they closed almost 100% of the leads they get. "If it's a client we want, we close it almost every time."

In my experience, I knew that to be complete bullshit. Local businesses are generally terrible at phone calls. Lawyers might even be worse than the average local business. There was virtually no chance he was converting all their phone calls. I decided to do a test phone call and record it. I called his office pretending to be someone who hurt their back in an accident. I listened as their team fumbled and bumbled and lost me as a potential lead. I then sent him an email with the recording. The email said, “Do you still think you convert 100% of your phone calls?” He was a little embarrassed but very open to our help and suggestions. That’s different to most agencies. They set expectations after a client isn’t closing phone calls.

We could have generated leads for him for 2 or 3 months. At some point, he would have told us they are bad leads and they aren’t working for him. At this point, we would probably try to tell him to do a better job closing on the phone. When we tell him he is bad at the phone 3 months later, does he believe us? Or does it sound like backpedalling and excuse making?

There is an important lesson in this scenario. It’s way easier to get your client on the same page on day 1 than on day 90. Win their trust from the beginning. Set specific expectations in all 5 areas. It is far easier to deal with problems of expectation before they come up. Set your expectations powerfully up front. You will eliminate more than 90% of the typical client headaches. It will make your agency life a lot easier.

Generally speaking, the longer your result takes, the more important expectation setting becomes. For a service like SEO, which might take several months to work, you need to set expectations over and over. A faster result means less expectation setting is required. A service like database reactivation, which can often work in just a few days, may be able to get away with very minimal expectation setting. Though it's always a good idea to get clients on the same page and eliminate the uncertainty of working together.

Set expectations lower than what you can realistically achieve. A lawyer once explained this to me brilliantly. "A client doesn't know how much an accident settlement should be. If I tell them $15k and it comes back at $10k, he thinks I'm the worst lawyer in the world. If I tell him $10k and we actually get $15k, he thinks his lawyer is a genius. I always set expectations lower than what I think we can actually accomplish." Well said. *Set expectations lower than what you can realistically achieve*. If you think you can get $5 leads in the first 30 days, tell your client $8 leads in the first 90 days.

Expectations Are How We Enforce Boundaries

People often ask how we manage clients without meetings. It's mainly a function of 3 things. Firstly, *we choose clients who are busy.* Meetings are also undesirable for them. Generally speaking, shoe buyers with money don't have an abundance of time. They don't want pointless meetings either.

Secondly, *the expectation framework enforces our boundaries*. If you only want to take calls on Tuesday morning, then tell clients you only take calls on Tuesday morning. If you don't do meetings, then tell clients you don't do meetings. If you only communicate by text, then tell clients you only do text messages. The more you lay out the rules of engagement from the get go, the easier it is to get buy-in from the client. *You get what you communicate as normal*. Use your expectation framework to tell clients how you like to work together. Ask and you shall receive.

Lastly, *we over-communicate early in the relationship*. Typically most meetings are clients feeling uncertain because they haven't heard much and they are trying to get informed. If they're already informed, it eliminates the need for a meeting in the first place.

Two Simple Client Communication Frameworks That Work

Framework #1: The Goodness Sandwich

This framework works well when responding to client messages.

- **Rapport**: The undertone of the communication is "I genuinely like you".
- **Parrot**: In your own words, feedback their concern to convey ,"I heard and understand you."
- **Why:** "The reason I'm sending this message is because ________."
- **Benefits** (optional): Especially if you're asking them to do something, briefly explain the benefits of doing it.

- **Restate Expectations**: Results. Cost. Time. Communication. What I need from you.
- **Thank you:** "I appreciate you because ______."

<u>Framework #2: The Drive By Update</u>

This framework works well when *proactively* updating clients about progress. We use it to play offense and inform clients before they even ask for an update.

- **Here's *what* we're doing**: Explain what you're doing for the client right now.
- **Here's *why* we're doing it**: Discuss why what you're doing is necessary.
- **Here's *how* it's going**: Describe where the process is at, including progress and issues.
- **Here's what to *expect* next**: Restate expectations so you are on the same page.

Remember, the longer your stuff takes to work the more proactive updates you will need. With a service like SEO, where it may take 12 months to work, you may need to update clients 8 to 15 times every single month. Until they see visible tangible results, you have to over-communicate. The more delayed gratification the service, the more you need to over-communicate.

Clients Who Understand The Process Cooperate

Remember the accountant we got $4 leads for? Let's pretend that this time around we set better expectations. Believe it or not, we could get worse results and he would be happier. We could get $12 leads, take 3 months longer, never once call the client, accidentally blow through $3000 in test ads, and still he would most likely be a happier client. That is the power of setting expectations. A client who knows what to expect *trusts the process*.

How do most freelancers and agencies set expectations? They don't. It's only in their head. If what to expect is only in your head, you can never actually keep clients happy. Of course there is a compound effect. If you have a Beyond Agency, use services that produce fast results, choose the right clients, and properly set expectations, then you will have positively thrilled clients. They end up being your raving fans.

Chapter 11: How To Deliver A Wow Client Experience

Imagine that every client who paid you once was *still paying you now*. Let's also assume they are happy and thrilled. How much more would you earn? If you had never lost a single client, what would your monthly income be? Would it create a big snowball effect?

That's because keeping clients is far more valuable than selling new ones. The single most important number in your agency is not how many clients you sign. *The single most important number in your agency is how long your clients stay*. It's about how many you keep, up-sell, and retain. If you could only pay attention to one key performance indicator in your agency, retention is the most important number.

Many agencies *think* they have a sales problem, when in fact they have a *retention problem*. Your average agency keeps peeps 3-4 months. That means 4x per year they have to build an entirely new business from scratch. This results in endless prospecting, sales calls, proposals, and hustling.

Keeping clients is how you start each month with money in the bank. If your agency was an airplane, *sales are your engine* and the *wings are your retention*. With enough engine power, you can fly a rock into space. Though it will inevitably crash back to the ground, usually right when you run out of fuel and motivation. You need to balance it with a nice set of wings to glide through the air with ease. Your agency needs to glide. Client experience is how we do that. The better the *experience* delivered, the easier keeping clients is.

Most Agencies Are Remarkably Average

Most agencies deliver mediocre results. They have an average and unremarkable service. They don't do much to show their clients they really value them. It's not just competitor agencies either. That's how most businesses are in every niche. When was the last time a business has *really impressed you*? When was the last time you weren't just another name and number? When was the last time you had a truly *remarkable customer experience*? It's probably been a while, right? Those experiences are pretty rare. We want to create a great experience that encourages happy clients to pay us *forever*.

Keeping Clients Comes Down To 5 Things

1. How you *communicate* with your clients.
2. How your *offer is unique* and how difficult it is to replace you.
3. What *results* you get and how quickly.
4. How you set and manage *expectations*.

5. The *little extras* you do to exceed those expectations.

A lot of bro marketers say “just get results” and you’ll keep clients. If you’ve ever had a client fire you after getting them a 10x return on investment or more, you know there’s more to it than purely results. If you are generating leads and phone calls, or ads are working, or creating nice websites, or clients ranked in the almighty Google, and you've had a client leave, it's probably not a results issue. It's probably a combination of how unique your offer is, how you communicate with clients, the expectations set, and how intentionally the little extras exceeded expectations. In other words, it's your *client experience*.

The Power Of A *Remarkable Client Experience*

How do you create more than just happy clients? How do you create absolute raving fans who swear by your company and what you do? *It’s about the client experience you create*.

Very little of *exceeding* client expectations has anything to do with the service you offer and what you do. In fact, it has nothing to do with marketing, leads, sales, or even getting results. Don’t get me wrong, without results, you certainly won’t keep a client. However, retention is far deeper than that.

Retention is about going above and beyond the call of duty *intentionally*. Once you understand the key touch points in the customer journey, it is simple to create a remarkable customer experience.

Clients Want To Feel Appreciated And Wanted

A wow experience is created by *how you make a client feel*. It is what you do above and beyond the call of duty. They want to feel that their business is appreciated, they are wanted, and that they are valued as a human being. I recommend you read *Never Lose A Customer Again* by Joey Coleman and *Giftology* by John Ruhlin. They both go into the following concepts more deeply. This book covers a compact analysis on how we applied these principles to the agency niche. These strategies are timeless. They will work for you as well as for your clients.

The 8 Phases Of Your Client's Journey

Phase 1: They are *assessing* their situation.

Phase 2: They *admit* they have a problem and need your help.

Phase 3: They are assessing you and your company as a *potential solution*.

Phase 4: They are *activated* as a client.

Phase 5: They become *acclimated* to your way of doing things.

Phase 6: They *accomplish* their original goal.

Phase 7: They *adopt* your principles of business.

Phase 8: They become an *advocate* of your company.

Let's be real. Most agencies don't make it through all 8 stages. Clients rarely make it through this entire journey. It happens for many reasons. Mostly it's because the agency drops the ball in one of these critical stages. They are not aware of the client journey. As a result, they fumble and bumble their way through it.

Customer Service vs Department Of Gratitude

How do most agencies handle the client journey? They typically have some kind of "customer service" process. Usually, if a client has a problem or concern, they can contact the owner, the salesperson, or a customer service rep by email or phone. The customer service team does their best to answer client concerns as fast as they can. The problem with "customer service" is that it is *playing defense*. It is waiting for a problem to arise and then being *reactionary*.

Your agency is much better served having a "department of gratitude". A department of gratitude is *playing offense*. Rather than waiting for client problems, we *proactively create happy client experiences*. We don't wait until a client is unhappy and then react. We *design* the client journey *intentionally* so client happiness is inevitable. The process ensures that *happy clients* are the only possible outcome.

Wow Experience Shortcuts We Learned

You never get a second to make a great *first impression*. What happens immediately after clients commit? Most of the time they will experience some form of "buyer's remorse". Buyer's remorse is the name for a typical buyer response that happens after making a big purchasing decision. The automatic response is usually the result of mistakes made in the past and worrying that history may repeat itself. While you did not create their automatic buyer's remorse, *it is your job to address it*. It is also an opportunity to wow your new client.

If you could hear your new client's thoughts, it might sound something like this. "What if I just made a mistake? What if I just got ripped off by another smooth-talking salesperson? What will my friends and family think? What if I end up looking stupid and foolish for this decision? What if I just wasted my money?”

That is the voice of buyer’s remorse. It is an automatic human response. Everyone has bought something that didn’t turn out the way they thought. Everyone has bought something from a pro salesperson and then the service and delivery underwhelmed them. That’s why the first impression is also a tremendous chance for you to really impress your new client. It is an opportunity to *reaffirm that they made the right decision* and that *they are in good hands* with you.

First Impression: Edible Arrangement

One thing we’ve done is order an Edible Arrangement immediately after a client signs. For about $65 including delivery, we send salted chocolate caramel apples and a few dozen cookies. We have a brand new client worried about having made a potential mistake. A few hours later, a delivery man shows up at their door with some delicious treats and a personalized thank you message. Whatever fears that they were “ripped off” are suddenly put to rest. They feel they are in good hands. They feel great about the decision they just made. Of course, this *client experience is by design*. That means this result is systematized and organized. The welcome message is completely standardized and we just swap in the new client’s name. It takes all of 90 seconds to place an online order to make a great first impression. It’s a little work to *create a great big effect*.

Most times the delivery happens within hours on the same day. Sometimes the client couldn't receive their welcome gift until the next morning. We've done it hundreds of times and it's never once failed to make a wow impression.

The First 2 Weeks Together: Signed Picture

We "borrowed" this next idea. I got invited to a mastermind meeting in Las Vegas with 12 of the biggest lawyers in America. Every attendee was the biggest lawyer in their state. Seeing how they managed their client welcome experience was inspiring. The top law firms would send a gift basket with a picture of their entire staff. The entire photo would be signed by everyone on the team.

We created our own version. Our welcome package has a few different parts that are still evolving to this day. First, I had our team take a picture with a big blank sign. We use the magic of Photoshop to put the client's name on the blank sign in a handwritten font so it looked very real. If our client's name was Joe, the sign said, "Welcome Joe". Then we had the entire team sign the picture. The end result is a photo of the whole team welcoming our client, signed by our entire staff. It is a designed experience that says "welcome to the family".

Of course, from a delivery point of view, this may sound like a lot of extra work. It's not. The whole thing is standardized into what's called an "SOP" or "standard operating procedure". More on that later. In essence, everything is prepared in advance and has step by step instructions. It takes just a few extra minutes to execute and we batch these tasks. We prepare 100 letters in advance, so when a new client signs, it only takes a minute to get the personalized signed photo out the door. It shows a level of care and attention that you just don't see anymore. How much effort is this little extra? Once we sign a new client, it's just a matter of 5 minutes of Photoshop, printing out a few documents, and dropping them into the mailbox. It's completed by a virtual assistant. A little extra effort for a big unexpected wow.

Our welcome package also has a page restating expectations. The package also includes a personal letter called a "master referral letter". This letter states how we intend to do such a good job that they refer us. The package typically arrives by mail a week or two later.

We do this step simultaneously as we ordered the Edible Arrangement. Because of the delay in receiving physical mail, the new client receives the Edible Arrangement and welcome package separately. It now seems like two separate moments of exceeding expectation, even though it's one 5-minute single effort. It cost us less than $70 total. The return on investment is that clients are staying years longer because we invest in the relationship from the beginning.

The Middle Lull: Personalized Text Messages

After a few weeks, the initial "high" wears off, and the reality of delivering your service and creating results sets in. Remember that the average successful business has been around for years and has had numerous shitty experiences with marketing companies. *Clients bring those bad experiences to the table*. What typically goes wrong here is that clients worry you aren't doing anything. Gaps in communication create a lot of client *uncertainty*.

My neighbor in Mexico built his dream house for retirement. When I saw his beautiful house, I asked him how his experience was. He said, "It was the worst fucking experience of my life."

He explained that he gave his life savings to a stranger in Mexico for an unseen house. Nobody returned his messages for months. He showed up a year later and the house was built perfectly with no issues. However, he was *anxious* throughout the entire process and that's with a *perfectly built house*.

Only 50% of our job is to build a great house (result). The other 50% is to *proactively communicate* every little step in building the house. The longer your deliverable takes to produce results, the more you need to proactively inform your clients along the journey. You want communication to be most frequent at the very beginning when they trust you the least. This often means *making a big deal out of little things* you normally do. "Hey good news, we installed your pixel today so we can track all your leads." A 30-day monthly report is a long, long time to wait if they've had bad experiences in the past.

Most agencies create a *communication gap* that *clients fill with uncertainty*. Often it's just because we are working on the client's account and don't have time to message them about it constantly. This is the stage where you want to *over-communicate*. The more you can keep your communication *proactive* and *intentional* the better the client will feel. This makes clients feel like they are in good hands.

Plan your client communications *in advance*. You don't have to send brilliant messages. Some of our messages are as simple as, "Just working on your ads today and excited for the good things that are happening." It's *not* about the results. It's the fact that they see you are on top of things. They don't know you have their situation under control unless you communicate it to them. When clients don't hear from you, they automatically assume the worst. They think maybe you took their money and ran or you just aren't doing anything. In reality, most times it's a sign of the opposite. You are hard at work on their campaigns. However, *they don't know that*. That's why *proactive communication* goes a long way. This is especially true if the communication seems unplanned and unexpected. Of course, you planned and scheduled your messages in advance.

Most agencies under-communicate. Their idea of "communication" is to send a 30-day monthly bill and a report. Most normal humans can't even read these technical reports. Clients find them technical and confusing. If a confusing report is all a client can judge you on, don't be surprised when doubt and distrust is the byproduct. In today’s busy world, talking like a real human is a powerful way to stand out. We can automate, schedule, and leverage all of this. Plan your drip fed communication before you even have the client. Be ready for the middle lull and *fill the communication gaps*.

Referral Devices: Free Assessment

If you get clients some results, at some point they are going to express relief or happiness. This is the exact moment to have the referral conversation. There are usually only 3 ways people try to get referrals.

1. They *hope* if they do a good job, referrals will just happen automatically.
2. They *directly ask* for referrals.
3. They *give value* up front using a referral device that makes referrals happen organically.

While doing a good job does produce a referral here and there, it’s slow and inconsistent. Directly asking is a lot like “begging for business”. A referral device makes this conversation seamless and easy. Referral clients cost nothing to acquire, they are pre-sold before they work with you, and they typically spend more than other types of clients.

Here's an example of a simple *referral device* that works. "This VIP card entitles you to one free assessment of your website and ads ($500). With this free assessment, most times we can save you or make you at least $1000. There is no obligation to purchase a service. This is just our special way of saying thanks."

How does a referral device work? In order for someone to introduce you to their friends, family, and colleagues, you have to make that referral conversation easy. A referral device is the easiest way to start that conversation without depending on a client's ability to brag about you. Referrals work best when you *make your client look like a hero*. Give them something of real value *without obligation*. Then it is just a matter of asking them to give it away. What 'value add' can you give clients to make referring easy? The end result is that your best clients will refer you more clients like them. It's a self-perpetuating machine.

The 6 Media To Create Client Experiences

We can use to 6 media to create a client experience.

1. In-person
2. Email
3. Mail
4. Phone
5. Video

6. Gifts

In each of the client journey steps, we can do something extra with these 6 media. Outstanding client experiences are created by going above and beyond our core service with personalized touches that add to the overall wow factor. Even if we can't implement an entire client journey in one day, just 1 extra touch is more than 99.9% of our competitors will ever do. Multiple touches create a sense of truly caring. We create a *strategically designed wow experience* from start to finish.

Personalized Client Presents Show You Care

The average agency loses their clients in about 3-4 months. If you are serious about building a real agency that is sustainable, you need to retain clients *indefinitely*. Personalized gifts are a powerful strategic tool; especially a personalized gift that hits the bullseye. There is never a bad time for a *meaningful* client gift.

In general, it is a good rule of thumb to invest 5% of earnings into keeping a client. If a client is paying you $2500/month then investing $100-125 is a small price to retain that client for years longer. This is why a department of gratitude is important. Clients never get tired of being appreciated and thanked. This over-delivering on a personal level will make retention almost automatic. You can have clients literally stay for life and pay you over and over forever.

Go deeper than most agencies. Who are your clients really? Social media has made this really easy. Often your clients' entire lives are up for public display. It takes 5 minutes to scan their public profile. You can get a sense of who they are and what's important to them. Here are some useful things to know about each client.

- Family and Pets.
- Affiliations.
- Hobbies.
- Passions.
- Important Experiences.
- Likes/Random Quirks.
- Important/Meaningful Dates.

We may not get every last detail. We're not after perfection. We're after something meaningful we can use. Gather what you can and save the answers in a spreadsheet. We're looking for places where we can *connect* with clients on a deep personal level. Of course, we don't just use client's information as marketing. The best way to show your clients you actually care is by *actually caring*. Take an interest in who they are and what makes them tick. Here are a few examples of how we've used this information.

We Love Our Clients And Their Dogs

One of our clients posted a status update on Facebook. She was sad because she was working so hard that her dogs had spent a week bored, alone, and at home. She had 4 beautiful dogs and the dogs didn't get much attention that week. We sent her an industrial size box of doggy treats from Amazon. It had a little note inside. "Dear doggies, this is my make up present. Love Frankie." It was $12 and it brought a huge smile to her life. We got back the sweetest little video of her feeding her dogs treats. Her face lit up like a Christmas tree. When that client stays for years, is it because of SEO, FB ads, or a great website? Or is it the relationship?

Gone But Not Forgotten

Another client tragically lost his son to a drug overdose. I got to know his son very well over the years. I still message him on his son's birthday to let them know he still matters. I think it brings them peace to know he is not forgotten.

SWAT Team Hero

Another person watches almost zero television. No Netflix. No movies. Nada. He is a busy entrepreneur. However, there is just one show he watches called SWAT and he absolutely loves it. He is a big fan of the main character played by Shemar Moore called Hondo. He told me he was remodelling his office. I sent him a custom signed Hondo photo for his office. It was under $30.

The Nature Boo Woo!

Another client grew up in the same town as wrestling legend Ric Flair. He is a huge fan of the Nature Boy himself. Ric Flair is famous for his “woo” taunt. In every single email, we include a Ric Flair “woo” GIF. What would a client rather read in an email? A boring 20-page SEO keyword report or their all time favorite wrestler doing his signature chant? This is one small example of how a department of gratitude can make retention a normal thing.

A Personalized Appreciation Note

We also send each client handwritten letters often. There are multiple affordable services online to send them for $1.50-$6 each. There is a level of care and attention when you receive a personalized handwritten note in your mailbox. Our notes are both standardized and yet customized. This means that core messages are all prepared in advance and drip fed over a time interval. However, we customize little details so each client feels appreciated. Do you have a detailed plan to wow your clients for the first 100 days? Is it clear what gets done, when, and by who? Are the messages systematized and organized in advance? Do you have a copy and paste process so you don't even have to think about wowing clients?

What Matters To *Your* Clients?

There are so many ways you can *create a wow experience*. What are their kids' names? Who are their pets? What sports teams are they crazy about? Who is their favorite musician? Where did they go to college? What are they passionate about? What experiences are meaningful and significant to them? What are some of their random quirks? What do they like to eat and drink? You don't need to guess. Anyone can see this information right there in their social media.

For just a few bucks, a virtual assistant on fiverr can gather all the info for you. Even if you are a brand new freelancer, for just a couple bucks you can know about each client. You don't have to do it yourself. Almost no agency takes the time to look at this key information. Except you. You're different.

Be clear on how you're going to deliver your wow experience before you sign your next client. Documented processes and procedures separate the amateurs from the professionals. Be a pro.

The Difference Is Exponential

See the difference this creates? Can you imagine what a profound impact it has on a client? Can you imagine how much more enjoyable working with you is compared to another agency?

Your average agency runs a mediocre service, gets mediocre results, never communicates expectations, doesn’t understand their own client journey, does nothing extra, gets fired in a few months without any referrals, and clients generally leave unhappy. They are generally poor communicators. It’s not malicious. They just don’t know a different or better way.

A Beyond Agency runs a great service, gets almost immediate results, proactively communicates, understands their client journey, surprises and repeatedly shows clients they are appreciated, goes above and beyond the service to connect with clients as people, and makes it very easy for their clients to refer them, has a documented repeatable process, and has great people to execute the details. They are proactive communicators and they intentionally choose to be different. They have found a better way.

Chapter 12: “The Thirty Year Wealth Shortcut” – Travis Sago

A special thanks to my mentor, the genius Travis Sago, for the brilliant ideas that follow. The following principles will help you get paid when you’re *not* working. It will change what *outcome* you are creating in your agency.

Most digital marketing agency owners are working towards the wrong end. They are trading time for money in disguise. It may look like they own a business, but in actuality, they just own a high-paying job. They see themselves as *service providers*. Let’s dispel that myth right away. Contrary to popular opinion, we are *not* a service provider.

We are *entrepreneurs*, *investors*, and *partners*. We *produce value* in the marketplace for real people. As an entrepreneur, our time and energy are finite. We cannot get more time. We certainly don’t have unlimited energy. We need to invest both our time and energy strategically and wisely. In the trading money for monthly services model, our income has a cap. Eventually, we get too busy delivering for clients to earn more. Not to mention, it’s fucking stressful!

In a typical agency, more money means we have more have tos. Most people end up with money or freedom, but not both together. *You* can have both money and freedom together with happy clients.

Wealth Shortcut #1 - Strategic Asset Acquisition

Have you ever played chess? Chess is a *strategic* game. Have you ever played checkers? Checkers is a *tactical* game. In checkers, you basically just move left or right. Chess masters can train in strategy for a lifetime. A master chess player is sometimes 10-20 moves ahead of their opponent. Checkers can be taught to an 8-year old in under an hour. Here's why this matters. An amateur chess player will beat a great checkers player every time. A *strategic entrepreneur* will beat a *trading-time-for-dollars freelancer* every time. Why does this matter? Beginner and intermediate agency owners work for money. It's the *model* that's flawed. That's playing checkers. The rich don't do this.

The Rich Do *Not* Work For Money.

Rich people work for assets. They use their assets to generate money *for them.* The rich play *chess*. Playing chess is like Barnesy, a mastermind member who started out selling 1-off, $1000 websites for local businesses. In a year, he built enough passive income to cover his bills. That passive income happens whether or not he ever gets another client again. His assets work even when he's not. This allows him to only accept "hell yes" projects. Like Barnesy, we want to be strategic. Playing chess is a subtle shift that has a huge impact on results. Assets generate cash over and over, often without an ongoing effort. In playing chess*, our agency is a vehicle designed to control and own assets*. It's our assets that produce cash flow for us. Client cash flow comes and goes. Assets accumulate over time.

As a digital marketing expert, there is a hidden opportunity for you. Because businesses normally have very valuable assets that they don't even know are valuable. What is the most *underutilized asset* in a typical business? *The customer list*.

This list represents a meaningful relationship with a business's most valued people. More specifically, *the relationship with the customer list* is the underutilized asset. The money is found in expanding those relationships by giving more. Rarely do businesses see their own *best* assets. A customer list is a powerful leverage point.

Plus, a customer list is just one type of asset we can acquire or control. There are other powerful assets too. Some of the best ones are *marketing IP* and distribution. We often have copy, sales pages, funnels, offers, and websites that are proven to convert. What works for one plumber will probably work for 7000 other plumbers in other locations. Sometimes getting paid for an asset is as simple as taking some shit that works on Facebook and bringing it over to YouTube.

Here's another example of how IP works in the real world. A few top lawyers I know became successful by creating a TV gimmick. Using this gimmick, they run a "metric fuckton" of TV commercials. Eventually, they realized there was another hidden asset because *their commercials worked*. Lawyers are typically licensed to practice in one state. There are at least 49 other states where their stuff wasn't doing anything.

The Ohio lawyer sells his working materials to the Florida lawyer. The Florida lawyer is not his competitor anyway. It's no extra work for the Ohio lawyer and it helps the second lawyer be successful faster. Because the gimmick and commercial are both proven to work, it's a good deal for everyone involved. The asset, which in this case is a working TV commercial, also gets used 20 more times. Ohio lawyer also licenses it in Nebraska, Hawaii, Utah, and 17 other states. This results in him getting multiple royalty checks every time someone succeeds with his gimmick. This is where he makes the big bucks. Those royalty payments add up. In fact, loads of *dead* celebrities are getting multi-million dollar royalty checks from songs and videos they made 4 decades ago. George Lucas still gets royalty payments from Star Wars toys. He was wise enough to ask for intellectual property rights to merchandise. For the studio, merchandise was an afterthought and Lucas has since collected billions by licensing his IP to toy companies.

To illustrate the power of assets, which would you rather have? Would you rather have a $2500 per month Facebook ad *client* or would you rather own a Facebook ad *system* that clients are paying $2500 per month for? It’s the system, right? So why do most agencies work for the *client* and not the *system*?

Here’s why a customer list is a big opportunity. Because provided we treat people well, *customers can be sold to again and again for life*. The $2500 SEO contract might last 12 months, if we’re lucky. A customer list can generate income for the next 20 years. Given the choice, choose the list.

Today most agencies are working only for monthly retainers. If you don’t have the money you want *today*, it’s probably because *yesterday* you were focused on making money instead of acquiring assets. When we work for cash, money comes and goes in up-and-down cycles. Assets continuously accumulate. Our assets work for us when we’re not.

Here’s the cool part. We don’t have to choose either cash or an asset. We can have both! We can actually work for both assets and cash at the same time. It only takes a few slight modifications to a typical agency. It requires being more strategic in thinking and more strategic in action. Less checkers and more chess. To execute this strategy, we need to be thinking at least 2 steps ahead. How do we get someone to just hand over their list of customers to us?

Wealth Shortcut #2 - Trash Can Assets.

Right before Corona started, I have an 8-figure entrepreneur friend who bought a large roofing company. Shit hit the fan quickly and he was suddenly hemorrhaging cash flow out the door. He spent millions to buy this company and it was all of a sudden on the verge of bankruptcy. He called me asking what could be done. “We need more new people”. He suggested Facebook and Google.

I knew better than to take his statement at face value. I suggested we try the customer list first. Turns out they had a customer list of 1700 people. Some of their clients were served over 10+ years. In 10+ years, the company had never once marketed to their past customers. They never once asked if their customers knew anybody else who needed a roof fixed. They never offered a special deal to finally get that leak repaired. They never gave clients a gift certificate on their next roof install. They never once offered something complementary like eavestrough cleaning. They never once even bothered to put all those names into a list. Their customer names were collecting dust in boxes in the backroom. Here’s a pic.

This is a “trash can asset”. A trash can asset is a valuable resource that a business is not using. Usually they’re just busy with other stuff. The asset represents zero or very little value to the client. It’s underappreciated, undervalued, and underutilized. Of course, it’s actually a highly valuable asset. Why? Because this business has a *relationship* with every single name in those boxes. What kind of relationship? Those boxes are everybody who has ever paid them in 10+ years of doing business. It’s *everyone who has ever given them a credit card*. The client didn’t even realize they had a list, never mind the value inside their data. That’s important because this asset is “in the trash can”. It has no inherent worth to clients because *they aren’t using it*. FYI, we made him a few hundred grand just by sending a 3-4 sentence very basic email to those people. He was able to make payroll and weather the storm.

Trash can assets are easy to get control of. As long as we can better cash flow an asset, it’s in people’s interest to turn them over. Uber has a gazillion cars and a gazillion drivers, all who work for them. They don't own a single car. Rather, they *control* these assets. Uber does this by better cash flowing cars than the owners could. AirBNB has control of strategic real estate assets all over the world *without owning a single home*. They got control of these assets by offering to better cash flow real estate. We're offering to cash flow assets that would otherwise be sitting idle doing nothing.

When we go to a business, our offer to get an asset is a soft ask and an easy yes. "You may have some gold over there in your dumpster. Would it be cool if I did a dumpster dive? You only have to pay me 30-50% if I find any gold for you. I'll clean up the dumpster and make you look good in the process. What do you think?"

It is a literal no brainer. Most times, they aren't even using their list now. To your client, your offer represents a big upside and a low downside. Typically, their only objection is they are worried about their reputation. By letting them know you will make them look good, "yes' is easy and automatic. That's all it takes to control a customer list. Of course, for the moment it is *their customer list* and *not yours*.

How do we ethically get the data for ourselves too? Here's where chess move number 2 comes in. That's where the *unbranded list* comes in. What can we do? Think about the roofing company again. Perhaps we invite the list to a private Facebook group or email list for "Local Deals For Los Angeles Homeowners". When they join, guess whose asset it is now? Guess whose list it is? Data is digital, which means it can be *cloned*.

Let's be really clear here. These people are *buyers*. Not leads. Not prospects. Not even "highly interested". These are the people who have a closet full of our client's shoes. They have already taken out their credit card and took action. Where are we going to find a more proven list than that? To top it off, we *start* the list *with the relationship* clients have already cultivated.

What happens when those customers join the unbranded group or list? This is a hard question to answer because it is only limited by our creativity. We can offer these people *whatever we want*. These people joined a group for homeowners, which means it is no longer held prisoner in the box of "I sell roofing". We can make deals to offer anything. It isn't difficult to say to another local business, "I have a private group of California homeowners. I'd like to offer them a special deal on your lawn care products and services. Would you be open to paying me a referral every time you make a sale?" The other business gets clients, the list gets a deal, and you get paid. Win-win.

What do we know about these people who hired the roofing company? For starters, we know they are homeowners. What else could we offer a home owner? What about other home contracting services? Fix ups? Local food delivery? Insurance? Fireplaces? Gardening and lawn care? Second mortgages? Security systems? Financial planning and investments? Cars? Vacations? Homes for sale in the area? There are no limits, only our imagination. We can put together deal after deal and have the asset pay us again and again.

We can send out as many or as few new offers as we want to. Plus, by having our own list or group, we can negotiate better deals. We can get our list better terms than they could find themselves. These savings are a great value passed on. They love us for selling them more good shit.

We also don’t have to deliver anything. We’re an investor working like a high level affiliate. When we offer other services, are we actually doing the work? Are we swinging a hammer, filing mortgage documents, or dropping off food on their doorstep? Or are we leveraging knowledge, expertise, and control of strategic assets? Are we getting paid from our strategic thinking, acting, and being?

Travis Sago says, “In every business:

1. There is a supply of something (a product asset).
2. You do something to it (a process asset).
3. You sell it to someone (a marketing asset).
4. The persons or distribution channel you sell it to (People assets).

The *closer* you are to the people, the more *valuable* the asset. The *farther* the less valuable the asset. This is why it's a shame people are so product focused. Product is the least valuable and it is an asset whose best use is to get customers and clients, which are the *most valuable*.”

We want to *think like an investor* and not think as a "service provider". Investors acquire and control under-appreciated and under-valued assets. They maximize their upside and minimize their risk.

PS

I go deeper on acquiring digital assets on my second book Passive Automated Recurring Income. You can find it on Amazon.

Millionaire Math

Imagine we lent $10,000 secured by a piece of real estate. This type of asset is called a mortgage note. Would we rather get paid $10,000 once or $333/month for 25 years? FYI, the latter is $100,000, only it's spread out in time. The wealthiest companies in the world are banks and insurance companies. These companies understand payment math. It's why they use financing to make their offers affordable. We can offer our assets on payment plans for as long as humanly possible. *We get paid like the bank* for work we do *one time*.

Of course, we can still collect a retainer while working for our clients. It is not an either or situation. We don't have to sell a service or get control of an asset. We do both at the same time. We just don't lose sight of the real wealth. The real wealth isn't the $1000/month the client is paying us. It is the assets that we are building for the long term.

The skill needed for getting assets is the *irresistible offer* skill. We first date a client's asset to see if there is indeed gold. We only commit to winning gold projects, opportunities, and situations.

Wealth Shortcut #3 - Bolt Ons/Additions To Flow

Do you know the one thing clients pay more attention to than anything else? *Their front end*. The 'new'. New is where all the scrutiny and blame goes. If you work on their front end, clients will watch you like a hawk. We don't need to chase new. There is already *flow* in the business elsewhere. We can simply *harness and multiply the flow that already exists*. This is what nature does.

For example, if you managed campaigns for a restaurant, which would be easier? To get complete strangers to try a new restaurant or to offer a killer birthday party to the people who already eat there? It's the second option. However, *in practice* almost every business does the first. They go after all the hard money. They go where there is no flow and try to create it. They chase "new". Nature harnesses and observes flow. Strategic business is the same. Where is there *already* monetary flow? How can we add additional value to what's already flowing?

If this seems like an abstract concept, here's an example. Let's say you wrote a 27-page PDF as part of your funnel. Should you advertise it to strangers on Facebook (new) or offer a bonus inside the members area of another successful paid course (flow)? If you have a small web design firm with 7 paying clients, which is easier? To get an 8th paying client (new) or to offer something extra to the 7 clients we already have (flow)? If you have a course that sold 50 copies, should you create another new course (new) or should you offer more help to the 50 buyers we already have (flow)?

Most agencies don’t harness the flow. That’s because they try to sell new “improvement” or “replacement” offers. “Oh that other company is running your Google Adwords? We can *improve* your results.” “Oh you don’t really like your website? Let’s *replace* it with a new one.” Improvement and replacement offers are difficult to sell. They require turning the whole ship around. They are *big decisions*. Big decisions are easy to say “no” to.

Bolt on or addition offers are easy to sell. They require no turning of the ship. They are *tiny decisions*. Tiny decisions are easy to say “yes” to.

“Oh you have 7 web design clients (flow)? I wonder if they would be interested in *adding on* a set of branded matching brochures and business cards? Selling Google Adwords (flow)? I wonder if we could *add on* a mystery shopping phone call service to help them close the calls they’re already getting? Oh you have 50 people booked tonight in your restaurant (flow)? I wonder if they would be interested in an *additional* free dessert coupon for their next visit?”

The only limit is our own imagination. We *find the flow* and *add value*. We add on and bolt on to what’s already flowing. If we want to move the needle, think less about replacing and improving. Get away from trying to create a new flow. Instead, think more about adding on to the flow that is already there. We put our sail into the wind that's already blowing. We put our assets into what's already flowing. Unless of course we really love busting our ass off trying to create flow where it's not already. Swimming *with* the current is easier. It's a choice.

Wealth Shortcut #4 - The Leverage To Work Once, To Get Paid Again And Again

In 2016, our agency was the first agency (that I knew of) to run Facebook ads for personal injury lawyers. The prevailing wisdom people believed was that only Google ads could work for this niche. This was because a potential client has to first be in a car accident. We couldn't easily target people in a car accident on Facebook. Furthermore, there were handcuffs on what we could say. On Google this was a far easier task. Clients are actively searching for injury lawyers. So why didn't we just run Google ads? Because the ads in the injury lawyer niche are crazy expensive. On Google ads, 78 of the 100 most expensive keywords are lawyer keywords. For example, "best mesothelioma attorney" is $1000 per click. If you click it, I think Google sends you a special hat or pin. Plus some bells, a whistle, and balloons. In your average big American city, most lawyer keywords are $150-200 for a single click.

Facebook leads are far cheaper. Making Facebook work required rolling up our sleeves and really figuring the process out. The targeting was trickier. Eventually we cracked it and we were running profitable ads. Sooner or later, we could repeat the results. Though it certainly didn't happen overnight.

Why am I sharing this with you? Because guess what happens when we sign a second client? We used the *same* ads, targeting, landing pages, and everything else. We took the asset that's already working and reused it for more results. Our assets multiply the results of a single effort.

Of course, that was in 2016. Knowing what I know now about assets, we could have leveraged it even more. We did not even need to run ads. We could have leased the working intellectual property to lawyers or agencies in other cities and states. We could have earned our fees passively through royalty checks instead of service contracts.

We could have also documented the process. We could have sold a course on how to run Facebook ads for lawyers. We could have taught other agency owners how to do this in other niches. We could have gotten 5 or 6 unique uses out of just one single client result. How many other ways could one successful result be leveraged into other income streams?

Therein lies the importance of *leverage*. When we work for a client now, what happens? After the initial effort, does that work continue to pay us again and again? Or do we have to always create new landing pages, campaigns, ads, copy, funnels, etc?

Right now in every agency there are underutilized assets. How can we get more use out of assets we *already have*? How can we take what's already working and reuse, recycle, reinvent, and reimagine? How much more could we get done if one client paid like 50? We don't have to change what we're doing. We can still trade client services for money. We just want to think about getting more use out of the assets we're already creating in the process.

Do you design a client's web page? What if you standardized the site as a theme and resold the rights on a popular WordPress themes website? What if we leased the creatives to other designers in non-competing niches? Have we figured out how to get $8 Facebook leads with a single PDF? What if we lease the PDF to non-competitors in other geographic areas? Did we get some webinar registrations for a coaching client? What if we documented the process and made a mini course for other coaches to model?

Most agencies do all custom work and build everything from scratch. They reinvent the wheel over and over. Most of our clients don't need custom work. We just think they do. We want to think about getting more uses out of what we're already doing. We've already put in the effort to create assets. We might as well get paid for our assets once more.

Wealth Shortcut #5 – Asymmetric Risk

Asymmetric risk means in simple terms, when we're *wrong* we want to be wrong *a little*. When we're *right*, we want to be right *big*. Imagine if when we flipped a coin, heads lost $10 and tails made $1000. Even if that coin has landed heads 7 times in a row and we're down $70, what should we do? Flip it again and again. We keep stacking the odds in our favor.

In the real world, *money is not the only risk*. When we enter into deals, we also *risk time and energy* lost. Sometimes we're going to be wrong. No one hits a home run every at bat. That's why we want to *manage our risk asymmetrically*. If we suspect a client is sitting on untapped gold, how can we *verify* they have gold using the least amount of time, energy, and money humanly possible? How can we be sure? If we're going to dig for gold, we *invest* our focus and resources *small,* looking for a likely *big* gold pay off. We do this strategically. Test small. Win big when right. Lose small when wrong. Over and over. The more upside the better.

The 5 Wealth Shortcuts Multiply Results

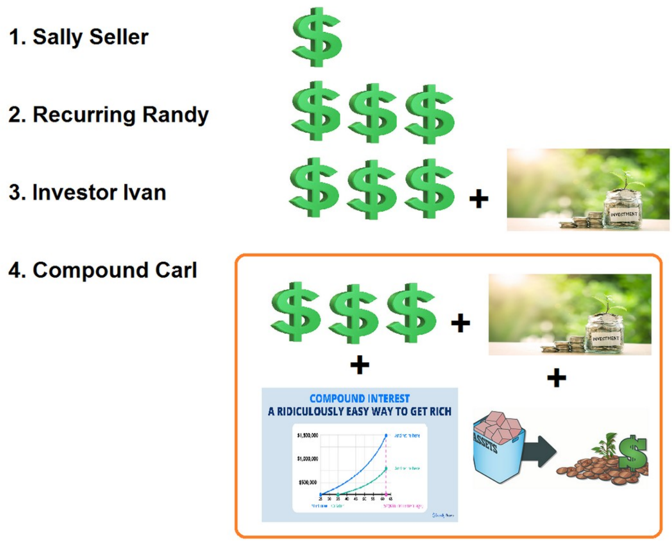
These 5 principles move out of the big trap most agency owners and freelancers fall into. They *trade time for money* in the form of trading retainers for services. That's how you build yourself a high-paying job, of which there is no escape. This takes away freedom to have experiences with the people that matter most.

These 5 investor principles shatter the time-money prison structure because it allows for earning money without ongoing time or energy. The old structure says every client must mean more work. These investor principles also change our *focus*. Instead of working at the hardest and most difficult part of business, we do things differently. We don't create flow. *We harness money flow*. We multiply results and amplify what already works by getting more use out of our assets. When we get strategic, we pick up assets out of the trash, we control and improve assets, we create strategic additions and bolt on offers, and we leverage results to get paid repeatedly on one effort. That's when accelerated *wealth is inevitable*.

Managing Money Like A Pro Investor

Albert Einstein described compound interest as "the 8th wonder of the world". I read about a US postal worker who invested $24,000 into index funds that follow the stock market. As a general rule, funds like the S&P 500 have averaged a 10-11% return on investment for 100+ years. There are lots of little ups and downs along the way, of course.

The postal worker withdrew his money 35-40 years later. How much did he have? $1.8 million. That's the power of compound interest. There are only 4 ways most agency owners get paid.



1. **Sally Seller**: Sally sells her service for a *single payment*. She trades a service for a one time payment and then goes looking for the next client. Web designers typically use Sally's pay structure. Sally constantly needs new clients and she can only earn when she sells websites. Sally *starts every month again at zero*.

2. **Recurring Randy**: Randy sells his service for *multiple payments* or an *ongoing monthly fee*. He trades services for ongoing payments. SEO and paid ads are typical for Randy. Randy earns multiple payments for a single sales effort. Randy *starts the month with some recurring sales*.

3. **Investor Ivan**: Ivan sells his service for *multiple payments* or an *ongoing fee.* What's different is he *reinvests* his profits into cash flow assets and investments. He earns both fees and residuals. He earns a little bit while he sleeps. Ivan *starts the month with recurring revenue and residuals* that grow over time.

4. **Compound Carl**: Carl sells his service for *multiple payments* or an *ongoing fee* and also *acquires assets* in the process. Carl reinvest his profits into cash flow assets and investments. He also reinvests into more cash flow assets. His cash flow buys more cash flow. His *wealth compounds endlessly*. Carl *starts the month with assets that provide recurring revenue*, *residuals* that grow over time, and his *residuals compound into other residuals*. Plus clients pay him too. His wealth grows while he sleeps.

While it may take 10 years to see the full picture, it's not uncommon for Compound Carl to earn 100x more per client than a single Sally Seller. Sally might sell a $1000 website one time and then need a new client. Carl might acquire reseller rights on a website, resell the same site over and over, and reinvest the profits until 10 years later he has $100k to show for one website deal.

The average hedge fund manager is 30-years old and has clients mostly over 65-years old. Often the older client has taken 30-years to accumulate real wealth. The hedge fund manager controls the asset and gets paid on it rain or shine. The hedge fund manager controls millions with leverage because he knows *how to cash flow* those assets better than the asset owner. Think more like a hedge fund manager and less like a web designer. This is a better path for true wealth. The kind of wealth where you actually have the time and freedom to enjoy it.

If you've gotten value from this book, leave a 5-star review on Amazon. This helps other people know this book is a useful resource for agency owners. By sharing key principles, it also helps you better retain the big ideas.

Chapter 13: From Hours To Seconds Using AI

Chances are this chapter will be outdated by the time this goes to print. But I'm writing it anyway. During the original release of this book, AI was not a thing. Today, if your agency is not leveraging AI, you're going to be left behind.

Instead of a long-winded chapter on AI do's and don'ts, I will just share what we're using it for. There are certainly more possibilities than laid out here. Hopefully nonetheless, you get a few good ideas of what's possible.

Our staff is also trained in using AI tools. We're able to dramatically increase employee output and accuracy. This is by no means a finished list. The hope is it may inspire ideas of what's possible for you.

Personalized Client Engagement

<u>Personalized Outreach Messages</u>
AI creates hyper-tailored messages by analyzing client profiles, incorporating specific details like business names, goals, and industry pain points.

Replying to Sales Conversations
Custom GPT tools analyze sales conversations and recommend responses based on proven frameworks. We can get text based sales people to respond just as we would without having any prior sales training.
Content Creation and Optimization

Transcriptions and Written Posts
Transform podcast or video transcriptions into written posts that mirror the original voice and style. This enables content re-purposing. Our content creates more content. We can be on dozens of platforms at once. With a single long-form piece of content, we get dozens of shorts, posts, emails, and blogs.

Content That Sells
AI utilizes pre-loaded sales frameworks to craft content addressing pain points, presenting new solutions, and leading to conversions. We've taken our winning frameworks and templatized them so we can generate more winning posts in seconds. I had a front-cover industry magazine article reach 30,000 people—entirely AI-generated

Direct Mail and YouTube Scripts
Winning scripts for ads and videos are generated by answering a few questions about the service. We can take any agency service or offer and create a winning video script based on proven templates.

Webinars and Sales Presentations

Webinar Slides

Custom GPT generates high-converting webinar slides based on our proven webinar formula. We can recreate an entire webinar on a topic in a matter of seconds, instead of hours of generating slides.

Five-Minute Loom Sales Videos

Our famous 5-minute Loom sales videos? It used to take us an hour to generate the presentation and slides. Now AI quickly generates sales presentations and slides in under 30 seconds by answering specific questions.
Research and Offer Development

Researching Client Problems

Remember earlier how we talked about using the phone as a tool to figure out what problems people are trying to solve? We can get AI to scrape search results and tell us people's problems in their own words in seconds. AI identifies industry pain points, current processes, and opportunities to craft offers that address real issues.

Offer Analysis

As Dan Kennedy says, "It's about the offer stupid." We have our own tools that can create, analyze offers, and create bonuses. We recently sold 50 people into a new offer that was 100% AI generated. Not 1 word of human generated copy other than programming the tool based on our frameworks. We also help other agencies with AI to transform deliverable-based offers into outcome-based offers that resonate with client needs.

Social Media and Marketing Automation

<u>Social Media Descriptions</u>
AI helps us automate a lot of the grunt work of social media posting. It automatically generate descriptions for visual content like Instagram or YouTube posts. It's based on the actual content and written in our style.

<u>Social Media Hand Raisers</u>
Before we create offers, we love to test them with a short offer summary called a "handraiser". We can test new offer angles with concise 1-3 offer summary social posts to gauge interest before building complex campaigns. These offer summaries are AI generated.

Operational Efficiency

<u>SOPs (Standard Operating Procedures)</u>
AI transforms high-level 2-3 sentence 30,000 foot view process descriptions into detailed step-by-step procedures. We use this for training staff efficiently. Effectively, I can describe a process in 2-3 steps. Our AI tools will ask me clarifying questions and then generate a step by step process. This makes delegation super fast and easy. Just follow the step by step tutorial.

<u>Onboarding and Client Communication</u>
All of the communication and expectation frameworks in this book? We've programmed AI to write comprehensive communication plans to set expectations,

build trust, and retain clients. Again, these are based on the proven frameworks of this book.

Client Acquisition and Retention

<u>Appointment Bookers</u>
Some partners still rely on manual sales. We use chatbots for follow-ups, appointment booking, and 24/7 sales automation.

<u>Website Chatbots</u>
We found we were answering the same questions over and over. So we built a database of questions. Our chatbots automate FAQ handling, cost inquiries, and booking processes directly through website interactions. Both for our own stuff and client offers.

Hiring and Employee Management

<u>Hiring Ads</u>
We have proven winning hiring ads that give us abundance choice of candidates. AI crafts personalized ads tailored to the role, attracting hundreds of applicants effortlessly.

<u>Trial Assignments</u>
Quickly create trial assignment instructions to screen candidates effectively without traditional interviews. We can give them a detailed small paid test task to perform in seconds.

Campaign Performance and Optimization

Analyzing Content Patterns
Analyze competitor content to identify winning patterns for future campaigns.

Create Thumbnails
I gave up trying to figure out what thumbnails work. I just gave a bunch of winning thumbnails to AI and had it decide. AI generates headlines and thumbnail concepts based on video transcriptions for maximum engagement.

Quick Revenue Campaigns

One-Hour Upsells
Generate campaigns to sell to existing client lists within an hour of onboarding, improving retention and immediate ROI. Clients love it when they make money nearly immediately.

Monetizing Facebook Groups
In my second book Passive Automated Recurring Income, we show people how to acquire assets. One thing is we showed how to acquire Facebook groups for very, very cheap. We then leverage AI to create monetization strategies for the acquired Facebook groups. We get the groups for pennies on the dollar and start monetizing immediately.

Book Creation and Marketing

Speak-a-Book Process
We interview clients for an hour, ask a dozen specific

questions, and AI turns the interview transcript into a written book. Interview clients and transform their insights into polished booklets for use as referral tools.

This is by no means a complete list but it's how we're using it today.

Chapter 14: Building A Team of A+ Superstars Who Make You Look Like A God

Would you love to be able to delegate more tasks? Do you ever struggle handing off tasks because no one has your eye for quality? Is it easier just to do it yourself? Do clients ever want only you specifically? Have you ever had a negative experience with a freelancer in a third world country? Do you feel like delegating means you would need to hire a rock star? Does it seem like a rock star would be too costly?

Great *Systems* Before Great *People*

Let’s say you're trying to find the perfect media buyer to run your clients' ad campaigns. It's a lot like trying to find a Gordon Ramsay to run your local burger restaurant. Diamonds in the rough are not easy to find, especially on a budget. Mistakes are expensive. Clients get lost. McDonald's does not depend on a great chef. They create world-class burger *systems* that any pimply-faced 16 year-old can run. Before you bring in the superstars, can you systematize your results so an average Joe could produce them? Then adding superstars to your process is just icing on the cake. *A great system is better than having great talent.*

4 Things You Need To Remove Yourself

Before you can *remove yourself* entirely from your agency, there are 4 steps you'll need to take. These items are listed in the order to do them.

1. Have a *complete list* of all the tasks your agency does.

Before you can start delegating tasks, you have to have a clear overview of all the tasks that your agency is responsible for. Sometimes the hardest part is getting all this out of your head and onto paper. This includes:

a) Sales & Marketing
b) Delivery
c) Communication
d) Hiring
e) Client Experience

2. Have a *detailed set of instructions* for each task.

This is often referred to as an "SOP". An SOP is just a detailed set of instructions, so that anyone can follow your 'burger' process step-by-step. Each individual task needs an SOP. *The E-Myth* by Michael Gerber and *Built To Sell* by John Worrilow are worth reading on systematizing your agency.

If you're looking to sell your agency later, it's a good idea to write out your SOPs in a Google doc. If you're just looking to build a lifestyle agency that runs itself, recording a Loom video is enough. In your video, describe the task steps out loud as you complete it. Store your recordings in a project management software like Asana, ClickUp, Trello, or Monday. We create a *library of everything that happens in our agency* step-by-step.

3. Have someone responsible for completing it.

In order for a task to move from *goal* to *project*, we need s*omeone responsible* to execute it. Practice assigning names to tasks that need completed, ideally names that aren't your own.

4. Have a deadline.

Projects have deadlines. Goals don't. We want to convert our tasks to projects by assigning someone and giving them a realistic deadline to complete it. The goal is to get an accurate picture of how long tasks take. It's not unusual for employees to need 2-3x as much time as you do. This is normal. You're the entrepreneur boss and you work extremely efficiently.

Hiring Success Secrets

If you try to do everything yourself, tasks will get done *faster*. If you do everything with a team, your agency will go *farther*. We want an agency that goes *farther, not just faster*.

If you're at the stage of hiring freelancers and staff, you already know the decision can make or break your progress. *Who* you hire is by far the biggest success factor. If you hire the wrong person, they will make your life miserable and stressful. You won't trust them to do a good job. You'll always have to micromanage them. The output suffers.

When you have to micromanage people, every decision in your business will depend on you. You only have so much time, energy, and attention. You will become your own company's bottleneck. If tasks feel easier just to do them yourself, alarm bells should be going off. It means your systems are lacking or you don't have an A+ fit. You can't grow if you have to carry every single task on your shoulders. Carrying your entire business means getting burnt out sooner than later. In the long term, your sanity depends on having good people you can trust to do a great job the first time.

Most people get stuck with B and C-level players. B and C-players usually have a "just enough" attitude. They are just looking for any job. They do the bare minimum. They often aren't so bad that you would fire them. You will also never be blown away by a B or C-player's performance. They will doom your agency to mediocrity. Don't settle for 'just okay' people.

On the other hand, a superstar will take a big weight off your shoulders. You can trust a superstar to do it right the first time. In fact, a superstar will do it better than you could have done it yourself. They may not be able to run the whole business as well as you do. However, with their one piece, they excel at it.

Employees Should Be "Hell Yes" Or No

Don't settle for anything less than a great fit. The right people have a 'can do' positive attitude. They believe in your bigger mission. They want their results to speak for themselves. With the right people, you can relax and let go when it's in their hands. You almost don't need to manage them at all.

The hardest part is not finding them, it's in the mental process of *letting go of control*. It is not putting everything on yourself. We're transitioning from high paid freelancer to real business with real infrastructure.

Hiring is a tricky slope. No one has all the answers. We will make some mistakes along the way. We all do. I once had to fire a bad employee for watching cartoon porn on the job. Twice. Yep. The first time was pretty shocking. The second time *he knew he was being watched*. He even had to click a button on his time tracking software to login to work, which then recorded his screen. Maybe he liked being watched. Who knows?

Nothing says you can't work here anymore quite like, "Hey so I checked your work output today and saw a cartoon Japanese chick getting fucked by an octopus. Call me crazy but I don't think that was productive work time."

My first employee was a freelance writer. He was a really nice guy and a terrible employee. For every 10 minutes of writing he did, I had to do another 20 minutes of editing. I hired him because he was a cheap virtual assistant. Because I couldn't pay much, I felt like I had to settle for broken English articles. In the end, I realized he was making life harder instead of easier. I spent more time correcting his work than he saved me. The right employees *lighten your workload*, not add to it.

I've also had great employees who understood exactly what to do. Great people regularly get things done right the first time. They produce work that turns out amazingly well. They are self-responsible. You don't need to look over their shoulder to make sure they are doing a good job. Clients love their positive upbeat demeanor. I have also had those amazing people. You can't lose with people like that.

Here are 5 shortcuts so you get an A+ fit on your team the first time.

1. **Have A Clear Defined Mission.**

A+ players are usually buying into your *why* more than your *what*. It's not *what your company does* but *why you do it*. They aren't there just to show up and collect a paycheck. They want to know their work is valued. They want to make a difference. They want to do something exciting. They want to co-create your vision. They want a valued use of their natural gifts and abilities. If you can't articulate your company mission beyond "we exist to make money", you won't retain A-players. Your mission should be written out, clear and concise. A *small but meaningful why* is enough. If you called any employee in the middle of the night, their stumbling, fumbling mouth should be able to recite your company mission.

Your mission gets everybody working towards the same goal. If your goal is to be "number one in client service", would it make sense to hire an arm-twisting, smooth-talking, inauthentic salesperson? Or would you be better served investing into your department of gratitude so you can generate more referrals? These decisions get easier when you have a clear picture of the mission. It also makes it easier to get your freelancers and employees to take on your values. They're clear, written out, and easily articulated.

If you're starting out and it's just you, a mission statement may not seem all that important. In actuality, you can't sustain growth without it. Even freelancers need to understand the mission. If you want to earn more and impact more, you need one. The most successful entrepreneur friend I have says, "If I have just one gift, it's that I can *speak the vision* over and over."

A clear, concise 2-3 sentence mission will also get you clear on the type of people you need. What is your mission?

2. **Pay 5-10% Above Market.**

Top talents have *choice*. You can't cheapskate your way into great people. Having said that, you don't have to break the bank either. If an average virtual assistant makes $350/month, be willing to pay $380-400/month. The right people aren't trying to get rich off of you. They want to feel well compensated and better off than they would be elsewhere. Depending on the position, it may make sense to pay them entirely on performance. Be willing to pay a little bit more to tilt the talent pool in your direction. Find out what market value is and be willing to go a little above it.

3. **Screen For The Right People In Your Job Posting.**

What is a job posting *really*? It is an ad that *sells why your company would be a cool place to work for*. It is not actually a "job posting" at all. It is your digital brochure that says, "Here's the cool mission that we're building."

Your job ads should scream, "If you're an up and coming superstar with our shared values, come join us." As much as possible, you want to be extremely real about what kind of person you need. Speaking in generalities won't bring the right people. If you want someone to answer the phone 7x per hour, say so. If you want to grow and aren't sure what their role will be in 6 months, say so. Just be real with people. People respect honesty.

You want to avoid generic traditional résumé babble. Typical job ads only attract typical mediocre talent. Don't say generic crap like "works well in a team as well as on solo projects." It's too unspecific to stand any chance of getting the right person. Those types of ads unconsciously say "come on in B and C-level players".

Think about how most people recruit. Most people end up with B and C-players. Don't model average. Model winners. Model great companies hiring processes. One of my wisest mentors always liked *making people do something different* in job ads. Sometimes, he would have people write a unique phrase on the cover letter. There's nothing quite like writing, "Hello my name is Frankie and I really love eating apples". Strange as it sounds, it shows you actually read the ad and who can follow instructions. He's *screening* for traits he needs.

Remember that most potential employees are just looking for any old job to put in a half-assed effort. They don't care who pays them or what they do. As long as they can make rent and get drunk on Friday, they will accept *any* job. We want to push those people away intentionally. Adding a little extra screening step helps avoid the wrong people. We avoid people who don't care about our company. We avoid that churn and burn employee mentality altogether.

We can even have people do a *sample mini task*. What better way to test them than to have them do a real 5-15 minute example task? Might as well give them a taste of what's to come later, right?

I once had no time on a Friday and needed a meaningful gift for a client. In my job posting, I gave instructions to find a gift idea for under $50 for a new client. I found the gift I needed. I also found the right employee. We were on the same page even before we started. Without an interview, I got a feel for how we would fit together.

4. Don't Interview. *Audition*.

We don't just want our sales process to be *phone-less* and *meeting-less*. We want our hiring process to be *interview-less*.

If we were looking for someone to be in our rock band, which is going to bring a better fit? Asking for a résumé about their last 5 bands or just playing a song together and see what happens? They could talk for hours about their last band and what computer skills they have. We would still learn more with 5 minutes of playing together.

Most people's hiring process doesn't actually make sense because they don't *audition*. They ask for a lot of facts that may or may not produce a quality hire. Don't copy everyone else's job interview format just because that's how everyone does it. Instead of asking potential candidates some meaningless questions, create a song together. Have an audition. A simple $5-$100 trial assignment will tell you infinitely more than any interview question. We often give out 20 simultaneous paid trial assignments to attract the top 1 or 2 people. No interview needed.

Think less about, "What should I ask them?" Think more about, "What can we do together in 20-30 minutes to see if we're a good fit together?" Just like a good band. Audition your talent.

5. First Date Each Other Before Marriage.

Most companies have broken hiring. They hand over a permanent job, give lackluster training, and then they hope they will magically end up with someone great. It almost never works like that. Even if they stumble onto a superstar, they will probably dull his or her spirit and bore them to death. Again, don't model most average companies. Model the great ones.

We don't just hand over a job to anyone. We offer a chance to work together on a first date. Over the long term, we're looking for an arrangement that works for everyone involved. Depending on what position we're hiring for, the ideal length of a first date can vary. It can be anywhere from 1 small project that takes a few minutes to 90 days together.

Feeling each other out first is a winning formula. You want to see that you work well together *in the trenches*. We can also give many first dates for the same job. I have given as many as 20 people trial assignments for one job. Then I have given a second date to the top 4 or 5. You will see the obvious performance differences, which helps you choose someone great. You'll end up with the top 1 or 2 people without having to hire and fire some duds along the way.

The reality is most employees just want any old job. We never want people who will do the bare minimum to not get fired. We want someone who loves being part of our team.

"First dates" also create a powerful psychological framework. It's kind of like being a starting quarterback in the NFL. What happens if the starting QB doesn't go out there and prove himself every day? He knows the backup will come in and take his job. That's why he proves himself daily. He fights to earn his spot day after day. He never takes his position for granted.

You want your staff to have that same hunger to prove themselves. They shouldn't feel like a comfy cozy job has been given. They should still feel like they have to go out and deliver.

See teammates as assets to grow with. Be willing to invest in them and train them. Though, there are a few exceptions. If you are hiring for a specialty skill set, like Facebook ads or programming, they should already have their own training. Otherwise, it is your job to build your team's skills up. Inspire them. Motivate them. Bring out the best in them. Always bring it back to your mission and your vision.

Be an employer who brings out their positive side. As often as we can, let them know they have done a good job and we appreciate them. We want to create a wow experience for clients. We can't do that unless we also create a wow experience for employees. You would be amazed at what a $25 Starbucks gift card and sincere "thank you" will do for team morale and performance.

Maximizing Upside And Minimizing Downside

These are 5 principles for hiring and retaining A+ superstars. We want great people who do a great job the first time. Everyone makes a hiring mistake from time to time. With a first date process, we minimize the damage to just a bad first date. This is asymmetric risk in action. We test small for big upside. We don't have to commit to months of unnecessary bad hires. This is how we end up with really good people with relatively minimal effort. Those superstars will rock client experiences and results.

Creating A Winning Culture

I read a quote from a well-known CEO that said something like, "If I wake your ass up at 3 am with a phone call, your stumbling, fumbling, drooling mouth better be able to repeat the mission statement." Above all, having a great company culture is about *repetition*. Decide what your company is about and s*peak the vision* over and over.

If you want to have great client service, tell your employees what great client service looks like. If you want to be the best SEO company in your niche, speak that vision. People don't hear it once and get it immediately. It needs to be intentionally repeated over and over. Culture is decided upon, written into principles, communicated in a mission, and repeated. *Principles* by Ray Dalio is a great book on this subject.

Managing Your People Proactively On Purpose

If you're in the managing stage, you are no longer doing any of the daily work. Your day is largely spent managing your team and getting the most out of them. Most of the time you're going to get the same questions all day long. Typically, it sounds something like this.

The Manager Question:
"Hey, do you got a minute?"

As a manager, you quickly become the bottleneck in the business. This is because every decision depends on you. You can't scale and grow as long as everything waits for an answer from you. It is necessary at this stage to remove yourself from the equation. You have to make less decisions but more important ones.

When it comes to the manager stage, most people are solving the wrong problems. The wrong problems are the ones employees bring to you in the moment. They are almost never high priority issues. That is managing *reactively*. We want to manage *proactively*. In our business, the right problems are the ones that data tells us are the critically important *leverage* points.

Which decisions are the critical and important ones? Only data can tell you that. You must know your numbers. This tells us the right problems to work on. In every agency, about 5-10 key performance indicators (KPI’s) tell you what to be focused on. Get your team focused together on the bottlenecks and collaborate towards solutions.

What Defines Your Agency Performance?

What are the 5-10 key performance indicators that define your agency? You want to spell those out so everyone knows what's important. Get your team working on the right issues, not just the seemingly most urgent ones. Rarely is what’s urgent truly important. Otherwise you can spend all day managing to put out fires and actually accomplishing nothing.

Let’s say you want to be the number one agency in client service. If you’re having problems keeping clients longer than 6 months, that’s a big issue. The 6 month number shows you what to investigate. A logo question from your designer might not be nearly as important as your company response time to phone calls and emails. If you're going to call a team meeting, what's better to work on? The logo or the retention issue? Leaders get everyone on the team working on the *right issue* together.

Be aware that the data alone won't solve your problems for you. It is like a magnifying glass. It will tell you what problems are worth investigating with your time and attention. It will reflect to you your bottlenecks. It will show your team what's important to your company. Once you know what bottleneck to solve, the right people working on the right problem can solve any issue.

Chapter 15: The Journey Of Purpose, Ayahuasca, And A Perfect Average Day

This chapter is a giant curveball from the previous chapters. In previous editions, people either loved it or hated it. With very little in between. In fact, I debated about including it at all. Here's why it's here for you to read. Your experience of life and business will be substantially better if you live with purpose, however big or small. That when you be, do, and decide who you are with intention, both life and business get better. Plant medicine changed my life. However, it's not for everyone. So if you want to skip this chapter, I would totally understand. It describes my journey to finding and living with purpose. Hopefully, it helps you too find more purpose in your journey and growth of your life and business.

In 2010, I had my first ayahuasca experience. If you're not familiar with ayahuasca, western medicine calls it "the world's most powerful hallucinogenic drug". For over 5000 years, natives in the Amazon jungle have used it as part of their shamanism healing rituals. They say that drinking ayahuasca gives one direct access to the spirit world. Ayahuasca translates to "vine of the soul" or the "vine of the dead".

It contains a chemical called DMT, which is what your body makes during REM sleep and during a near death experience. In truth, it is not just a drug or just a spirit journey. It is both.

When I first heard about this fascinating compound, researching it became an obsession of mine. In 2010 ayahuasca was far less “mainstream”. I had to really dig for information.

Miracles Of Spirit

I kept reading stories that were utterly mind-blowing. Often people would have miraculous healings accompanied by intense life-altering experiences. One person had a lifelong depression cured in a single experience. They told wild stories of puking out demons and seeing visions of God. Another person had their vision restored after a life of blindness. Another person had their cancer instantaneously healed. It wasn’t just that these people had cured the incurable. The people always came back talking about spirits, afterlife, angelic beings, pure peace and love, and a deeper sense of reality. The more I read, the more I wanted to know.

I was in an interesting predicament in my life. Growing up both my parents were alcoholics. My mom was an unsupported single mother who got burnt out. I saw my dad once every 6 months. Being there for us wasn’t really his thing. I was very “anti-drugs” because I didn’t want to go down that same road. My mother stuck to just the booze. On the other hand, my dad had tried every drug under the sun.

My childhood was mostly a collection of traumas and drugs were a central player. There was always a questionable cast of characters moving through our neighborhood. I saw far too many things that a 10 year old shouldn't see. I knew what heroin was at 9 years old. I had my stuff stolen lots. This led to an opinionated me that said "drugs are bad". Yet somehow ayahuasca seemed *different*. I couldn't explain it. I just knew I had to try it once in my life. I didn't know how or when. I just knew that I was meant to try it.

I Finally Took The Plunge

In 2010, I discovered you can legally buy ayahuasca online. They ship it right to your doorstep. There are two components in an ayahuasca tea. Neither component does anything without the other one. It was only illegal once the ingredients were combined. The first component is a DMT-containing leaf, commonly called Chacruna. The other is the ayahuasca vine itself, which contains no active drugs. Our stomachs contain an enzyme that normally breaks down DMT before any effect is experienced. However, the ayahuasca vine has a chemical called an MAO-inhibitor, which prevents the stomach from breaking down the DMT. You need the MAO-inhibitor and the DMT together. Once combined they make for one hell of a journey.

In my first experience, I followed the dosage that the internet recommended verbatim. Knowing what I know now, I would only recommend using it without an experienced shaman. I would not buy it online like I did. At the time, I wasn't wise enough to know what I was getting myself into.

In my first experience, I tried a very tiny "introductory dose". I experienced a few pretty colors but nothing significant. The second time I took a little bit more. More pretty colors but it was also nothing life-changing.

The Experience That Changed Everything

The third time was the beginning of something incredible which continues to this day. It was my first ever "hallucinatory" experience. I remember the walls around me started to flow and became alive like the waves of the ocean. It was immensely colorful and pretty but it wasn't anything profound.

I felt disappointed yet again. Online I had read all these incredible ayahuasca stories. Yet here I was just seeing a few pretty colors. I remember thinking in my head, "Where is my miraculous ayahuasca healing?" Then boom it hit me like a ton of bricks!

It was one of the weirdest experiences I have ever had, if not *the* weirdest. It's as if it physically took over my body. I was sitting on my couch, staring forward into space. When suddenly my right arm lunged down, yanked a Kleenex box off the ground, and ferociously pulled it an inch from my face. Whoa! Freaked out I said, “Whatever that was, don’t do that again.” I pushed the Kleenex box away with my other free hand.

I began again, “Where is my miraculous healing?” Again suddenly my right arm lunged down to the ground and yanked the Kleenex box towards my face. It was entirely bizarre. I used my left hand to push it away again. This happened 5 times in a row. Finally I said, “Okay, I’ll look at it.” I gazed into the Kleenex box. Suddenly something unexpected happened.

The Kleenex box had outer space patterns overlaid with the words, “Of dreams and inspirations”. Suddenly out of nowhere, the words began to shimmer. In a few seconds they became 3-dimensional. Then the words floated right off the Kleenex box. In my vision, I watched as the words slowly floated right into the center of my being. The minute those words “hit me”, I felt instantly inspired. It wasn’t just the word “inspiration”, I had embodied its meaning. I felt so beautifully free.

The Universe Inside The Kleenex Box

I stared deeper into the Kleenex box. The outer space pattern inside began to look three dimensional. It was like I was looking into a little tiny universe inside of my Kleenex box. I felt like Galileo or Copernicus must have felt as they discovered the cosmos for the first time.

I lost myself for hours, just watching this Kleenex universe expand and create. Galaxies flowed, worlds collided, and new stars were colorfully born. I lost myself deeper into the tiny Kleenex world. If a cop was around, I surely would have been arrested. Here was some weirdo tripping balls staring into a Kleenex box. You don't exactly see that every day. Thankfully I was safe at home on my own couch.

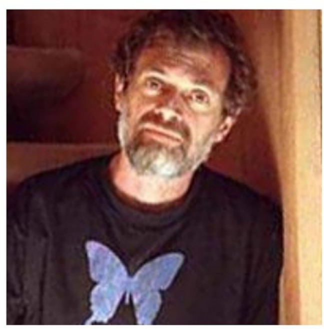
With my online supply, I drank ayahuasca 6 times over two years by myself. Then the story took a wildly interesting turn. The next day I was again stone cold sober. Yet this visionary experience somehow continued. I started repeatedly seeing the same synchronicity again and again; a blue butterfly.

11:11, Blue Butterflies, And Synchronicities

Every single day, I would see different blue butterfly synchronicities. This happened 15-20 per day. This continued every day for over 2 years. If you've ever walked by the clocks and it was 11:11 or 1:11, you have probably had a similar experience. Except this same sign was happening to me repeatedly. I can remember 5 or 6 times turning on the hockey game at the exact moment the score was 1-1 with 11:11 to go in period #1. The top of the screen would read, "11:11 1 1 1". The butterflies and numbers happened in so many unusual ways. I would not have believed it myself if I had not actually experienced it.

Someone mentioned a prominent psychedelic author and speaker named Terence McKenna. They suggested I check him out. I opened a YouTube video and his t-shirt was a blue butterfly. Another time at the grocery store, my girlfriend asked me to grab a vegetable tray. I managed to pick up a veggie tray off the shelf without noticing it. When I got home, the tray itself was a blue butterfly. There were different cut up vegetables in each part of the wing.



Another time I was checking out books on Amazon. Something interesting caught my eye. It was a book about near death experiences. Of course, more blue butterflies. There was a butterfly on the front cover. There was seemingly nowhere I could hide. I remember watching a porn video. The girl bent over and on her ass was a big fat blue butterfly tramp stamp.

When A Video Game Becomes Reality

Then there was my most memorable synchronicity. My girlfriend bought me a Nintendo Wii game called Skyward Sword. It is part of the Legend of Zelda series, which was my favorite game as a kid. Playing Zelda is a full excuse for me to geek out and disconnect from reality for a week. The game started out as a pretty typical "save the princess" kind of game. You're the typical sword-wielding good guy, presumably trying to get laid by the hot princess. Of course, as the story went on, the game only got weirder and more synchronistic from there.

Within the game there were these beautiful meadows. In the meadows, there would be 3 or 4 blue butterflies. The butterflies floated around each other, weaving a tight little circle. I remember thinking, "Here we go with more blue butterflies." About 3-4 hours into the game, the story takes a wild detour. Your character gets knocked unconscious and while you are unconscious, the princess goes missing. You wake up hours later with a spirit over your bed. The spirit says, "I can't explain why but you must come with me right now. I have something important to show you."

The spirit then takes you down a secret pathway to a hidden temple. Inside the temple she teaches you a sacred medicine song. She says, "This is a sacred healing song passed down from spirits. You must play your song where the blue butterflies gather."

Deeper Down The Rabbit Hole

This story gets more synchronistic still. In the game, you find the circling blue butterflies and sing your medicine song. At that point, one of three possible things happens. Either a stone pops out of the ground and imparts upon you some *deep ancient wisdom*. Secondly, hearts shoot out and your character collects them to have his *full health restored*. Finally, a gateway opens and you *leave your physical body* to go on a *journey of spirit*. On these spirit journeys, you acquire items and knowledge that can be used within the game later.

These non-physical journeys were powerful. For me, that Zelda game story became quite literal. Because that's what actually happened to me. More on that in a second.

The sixth time I tried ayahuasca on my own was intense. I decided I was ready to go deep. I was ready for a real spiritual experience. I was no longer content with a few pretty colors. I wanted answers.

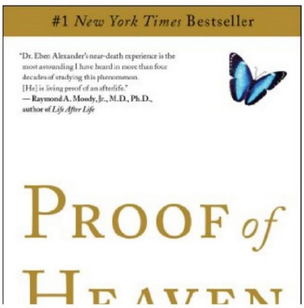
Drinking Enough Ayahuasca To Kill A Small Elephant

I brewed my ayahuasca tea 50-100 times as strong as the internet recommended. There was no turning back. I still remember my little prayer of intention before I drank. It was quite simple and to the point. “Please God don’t fucking kill me.”

It took me over an hour to summon the courage to drink it. Partly because ayahuasca is the most foul tasting brew I have ever consumed. Partly because I was utterly scared shitless. I knew I was truly letting go of control.

The visions began. At some point, I had a vision of a massive blue butterfly. It was made up of millions of tiny blue butterflies. By this point, the sheer number of blue butterflies in my reality was getting eerie. What did it all mean? If the universe was trying to tell me something, clearly I wasn’t understanding the message.

Hours later I was finally sobering up. I had enough wherewithal to try and make sense of all these blue butterflies. I decided to do what any savvy internet nerd would do. I googled that shit. Only one search result came up. There was an ayahuasca retreat in Peru that used the Blue Butterfly at their logo. I knew instantly I was meant to go there.



Months later I went down to the Amazon jungle to drink ayahuasca. It was my first time with a master shaman. In December of 2012, I had my first real undeniable mystical experience.

The retreat center I visited is known for having the strongest ayahuasca anywhere. They also have a 'home brew' they used privately for training shamans. The home brew is anywhere from 2-4 times as strong as the normal brew. The normal brew is already legendary strong ayahuasca. The maximum dosage they ever give anyone is a full cup. I drank a full cup of the home brew.

I thought I knew what strong ayahuasca was. I had no fucking idea. In many ways, you could say I tried the *strongest dose* of the *world's strongest drug* by the *world's strongest provider*. It made for a pretty eventful night.

The First Mystical Experience

Intense does not even begin to describe my experience. In a typical ayahuasca experience, you drink and an hour later, you experience the effects. There is a time delay before you feel anything. On a full cup of the home brew, I was tripping balls seconds later. It hit me harder than anything I had ever experienced before.

The experience went on for an eternity. It grew and grew and grew in intensity. At least 100 times I was sure I was dying. I eventually reached a place where everything was one eternal unending infinite loving creation.

The experience was beyond any words I had to describe it. There was no time, no separation, no end, and no beginning. Everything was utter loving perfection. In all the cosmos, not even a single grain of sand was out of place. I radiated an infinite loving peace to all beings everywhere.

I had questions answered that I had wondered about my whole life. I saw why everything was, down to why my curtains were red in my first childhood house. Everything was magically connected in an eternal dance without end or beginning.

“Hallucination” is not the right word to describe it. Reality did not “stop”. It changed and grew into a bigger, more complete picture. The current reality just became a subset of something bigger and more profound. An infinite game of life that never ends.

I experienced a deeper part of reality in a way I will never forget. That night I released a lifelong depression and anxiety. I can remember the exact moment when I let go of my last ever panic attack.

I experienced colors I had never experienced before, sounds that created worlds, colorful beings that radiated pure love, and just a deep knowing that it was all okay always.

Since then, I have had over 500 of these types of mystical experiences. Many were on substances and many of them were experienced while stone cold sober. It was like once I found that ‘place’ within the plants, I ‘remembered’ how to access it. I didn’t need a substance to “go back”. Pretty crazy story, right?

What Does This Have To Do With Your Business?

What does any of that have to do with running a digital marketing agency? Absolutely everything. Intention and choice is everything. Before that night, I was at a difficult point in my agency. I was mostly running SEO campaigns for plastic surgeons. I also ran some Google Adwords campaigns. At some point, I had an eternity to look at my life and I realized that running campaigns wasn't what I really wanted to do with my life. I didn't want my tombstone to read, "He was good at building backlinks."

In ayahuasca, you often purge physically by vomiting. I literally vomited up my SEO agency. I decided to let it go to pursue something more meaningful. I was afraid to lose the success I had built. I didn't know what I would do instead. There were only unknowns and uncertainty, which made it a big leap of faith. However, I realized something. The skills I had learned would continue to serve me forever. If anything, the business was just evolving into a better place.

When you have an eternity to be real with yourself, a few funny things happen. You get to ask yourself a lot of deep meaningful questions. Why am I doing this? Is this how I really imagined my life? Is this what I really want? What would truly make me happy? When my life comes to an end, what kind of difference do I want to have made in this world? Who do I want to impact? Why am I really here? Who do I choose to now be?

Do You Love Your Business
Or Is It Just A Means To An End?

I realized that I really didn't love much about my SEO agency work. I loved the freedom of being able to work anywhere with a laptop and WiFi. I loved getting paid steady regular income every month. I loved the feeling I got from really helping someone. I loved contributing to a business that truly added something to this planet. I loved some of my clients very dearly.

I also realized that a lot of it just wasn't working for me. It was really just a means to make money. In fact, lots of the daily things were the bane of my existence. I hated having client phone calls that were like an interrogation. I hated feeling like I had bosses. I hated building backlinks and staring at a computer screen all day. I hated being dependent on Google. I hated that every new client meant I had more grunt work. I hated that some clients would leave disappointed and I would carry that on my conscience. I hated that it was a thankless job and nobody ever really appreciated the hard work I did. Most of all, I hated that I had no control over my own life. If a client wanted to talk on a Sunday night, I never truly felt like I could say no. I hated that I wasn’t really free.

Designing Your Agency To Serve Your Life

What about your own agency? Even if these types of experiences aren’t for you, you can still benefit from the lessons and insights. Because one thing is for sure. You most definitely can have a digital marketing agency *your way*.

You can have the parts you actually like without all the parts that suck. Most people just accept those parts. You don't have to.

Here are a few ideas you can take from these experiences.

What Is Your Purpose?

Why do you wake up each day and do what you do? Is this how you truly want to make your mark on this planet? Personally, my highest value is freedom. I believe a life with freedom is the only life worth living. The bigger purpose of this book is to give you back your freedom. What do you stand for? What makes you feel truly passionate and alive?

Finding your purpose doesn't work like most people think it does. Most people think you "discover" your purpose. That is a serious misconception and people get stuck looking for what cannot be found.

Purpose is created. It is a choice. You choose to create purpose for yourself and you express that purpose in lots of little every day actions and decisions. The first thing you do in the morning is purposeful or not. What you eat is purposeful or not. The client you choose to serve is purposeful or not. It is tons of tiny decisions that add up.

The Single Most Important Choice You Make

Before you can decide *what* your purpose is, you must decide *who* your purpose is. Who do you really want to work with? Who are the clients who really inspire you? Who makes you want to get up out of bed and do something to better this world?

Because who you work with makes all the difference in the world. The right people appreciate you, you get them results, they are fun to be around, you laugh with them, you can just be yourself, and you know you're making a difference.

If you choose the wrong people, you will spend a lot of your time feeling guilty, feeling obligated to them, feeling their disappointment, being fake, and dreading every interaction with them.

You cannot live purposely without purposely choosing which people to impact. Who you choose to work with matters more than any other decision you make. We are not trying to save the world. *It is better to have a small but meaningful why*. We want to choose our people intentionally.

Who Is Your Perfect Who?

Your perfect client is not merely an academic exercise. Think back for a moment. Who is a client you truly loved serving? What made them a wonderful client? How cool would it be to only have to help people just like them? What were their values that you shared? I bet they were easy to help, fun to interact with, said thanks, and paid you a lot. What else made them a great client for you?

Now think back about your worst clients. Who is a client you just didn't vibe with? What made them a crappy client for you? Were there warning signs there that you didn't see at the time? I bet they were rude, demanding, didn't see your value, had unrealistic expectations, blamed you, and were unwilling to help themselves. What else made them a bad client?

Now look at all the things that made your bad client a bad client. Then look at all the things that made your great clients great. Notice any patterns?

Decide on your *who*. Because when you get clear on this central issue, you intentionally choose the clients that make sense for you. Grab a pen and paper for this next part.

The Perfect Client Exercise

What makes *your* perfect client a perfect client? It is a combination of two things.

1. Their attitude (80%)
2. Their situation (20%)

On a blank sheet of paper, draw a line down the middle. On the left side, we are going to write the traits of your best clients. On the right side, we are going to look at the traits of your worst clients. Your past leaves clues. The goal of this exercise is not to live in fantasy land. Think about *actual clients* you have had. You want to talk about *real people* with *real names*. You want to evaluate real situations you have worked in.

What made the good ones good? What made the bad ones bad? Write down your answers.

Attitude Is A Choice

Start with their attitudes first. What attitude made the good clients good? What made the bad ones bad? What were their attitudes like when you worked together? Write down your answers so you can see the differences. Pause for a moment to reflect as you write these down.

What Problem Did You Solve?

Next we want to look at your client's *situations*. What was happening in their situation when they contacted you? *Why* did they call you?

Look at someone you really helped in the past. What problem did you solve? What did you do for them that really helped them? Pause for a moment and write down your answers.

What if you've helped different people in different situations? It's totally okay. We want to get a clear picture of the attitudes and situations in which you weave your magic. We want to see what problems you enjoy solving and for whom you love solving them. This is the core of an agency with purpose. This is the core of having a *small but meaningful why*.

The more you do this exercise, the clearer you will get. You want to know the right person and the right situation for you. You should be equally clear about who you should *not* be working with.

One of the best financial decisions you can make is saying “no”. Be willing to say “no” to any client who is on the wrong side of your paper. Sometimes, this can be hard when someone has a credit card in hand ready to pay you. Be uncompromising in your high standards. Because it is not the money alone you are saying “no” to. You are saying “no” to a bad situation, a bad attitude, or a problem you do not enjoy solving. Rejecting the wrong clients will make bringing good ones easier.

Hell Yes Or Hell No?
The “*Hell Yes*” Lifestyle.

If you are not an enthusiastic 100% “*hell yes*” about any client, opportunity, or situation, then you are a “no”. Don’t settle for less. It’s either “hell yes” or it’s a “no”. There is no in between. You deserve a “hell yes” lifestyle.

The 5 Critical Questions Of Your Purpose

Now that you are clearer about the right who, let's go a few levels deeper. Let's dive into your true purpose.

There are 5 specific clarity questions it helps to have clear answers to. By having that *clarity*, you move towards what you love doing. Specific clarity gives you the power to do what you are truly meant to do. It will put you inside of your zone of genius. This is where you make maximum impact with minimum effort. This is where your results flow with effortless ease.

Always remember, you are not meant to be all things to all people. You are made to have a big impact on 1% of people. *Your people*. You are meant to double down on your strengths. Where you are weak, others are naturally strong. What you do not enjoy, others love. Everything that is not 100% "hell yes" should be outsourced or eliminated.

1. *Who* do I *most love* to work with and help?
2. *What* do I really *love to do*?
3. *What* am I really *good at*?
4. *What* does the world really *need*?
5. *How* can I *get paid* to do that?

The center of your answers is a magic place where these answers overlap. Don't be theoretical with your answers. Your past experience leaves clues. Who should you work with in the future? Who do you already love working with now? What will you love doing tomorrow? What do you already love doing now? Pause and write down your answers. If you want to know who you should help tomorrow, look at who you already love helping today. If you want to know what you’re good at, look at what problems you already solve now.

What Does The World Need From You?

The fourth question, understanding your market's needs, is a bit unique. You cannot answer this question all by yourself. You must spend some time actually *listening* to your market.

The best resource is to ask your actual clients about problems they have. You can also read Facebook groups or Amazon reviews. You want to find conversations that get a lot of traction and get up-voted a lot. That is your market saying to you, “Here’s what you should be paying attention to.”

Get clear on the answers to these questions for yourself. Know your why. Know yourself.

What Is Your Perfect Average Day?

Most entrepreneurs have goals. In general, goals are a good practice. I run a private goal writing group on Facebook. The problem is the way most people create goals leads to them being disappointed. Not all goals produce results equally. There is a special kind of goal that makes outcomes happen automatically. We call these *process goals*.

Most people set *external results goals*. They want to make more money. They want to sign more clients. They want the house and the Porsche. For the record, I'm not saying you shouldn't have those goals. You should. It's just that process goals are what produces those kinds of results. They make the Porsche and the mansion a byproduct of what you love doing.

Process Goals Over Regular Goals

Imagine two people. One named Tall Tree Teddy and another named Watering Walter. Teddy has a goal to create a 10 foot tall tree. He puts pictures of the tree on his vision board and busts his ass towards it daily. He writes his goal about a 10 foot tall tree every day. He puts in daily hustle and grinding effort.

Walter has a process goal to water trees. Somewhere in his journey, he discovered that he really just loves watering trees. Being with trees is its own reward. Gardening is his true blessing. He finds it a lot like meditation. Every day he waters a tree, he does what he loves. Walter has no goals whatsoever to create a big 10 foot tall tree. He waters trees just for the love of the process.

In 3 years time, who do you think will have a 10 foot tall tree? Who will have inevitably hit their goal? I've witnessed many Teddy's give up while Walter just keeps plugging away. The Walters almost always end up with 10 foot tall trees. Teddy has to do what he hates everyday to grind towards a goal. Walter can be in the moment enjoying it and tall trees just naturally happen. Plus, Walter just keeps going even after his tree is 10-feet tall. Switch out a $1,000,000 agency for a tree and the story is every bit as true.

How do you love spending a day? How can you design your *perfect average day*? How can you design a life that is spent on your terms? What processes are their own reward for you? What processes automatically create the outcomes that you want?

Money is an effect. It is an output of the input of giving value. We want to focus on inputs that cause our outputs. It is extremely important to focus on an *average day*. Sure you may have a day where you skydive from 15,000 feet, land in the Playboy mansion, snort cocaine off a dozen models' asses, and drive a Ferrari at mach speed to your yacht. But that's not sustainable. Most of your days aren't going to be like that.

Design your average day on purpose. Then you design your agency to fit into your life around your perfect average day. Design your agency your way so it supports your life. It should not own your time. It should not own you.

A Cool Ass, Totally Normal Day

To give you a sense of what's possible, here's what this looks like in our family. In the last 5 years, we have visited over 30 countries. Some we visited for months and others just a few days. We did whatever we felt like. I've made two beautiful baby girls and have a third on the way. My daughters are Heidi and Zelda.

Each morning begins with a prayer of thanks for what we have. I give my baby girls a hug and a smile. I let them know that they are loved. My lady gets an extra sexy kiss, sometimes with morning breath, sometimes without. We all lay in bed together and have cuddle time for an hour.

Sometimes I read a few great books that have been recommended by other great entrepreneurial friends. I like reading a chapter or two out of several different books. Then I read some Dr Seuss to my daughters and anything else they ask me to. We always get new books for family reading time.

We make a fresh homemade green vegetable juice. I spend about 20-30 minutes visualizing and connecting with what I want to accomplish. Then we all make a nice healthy breakfast together.

Around 11 am, I work for 2 hours on what's most important. I focus on the processes that I enjoy which directly create outcomes I also desire. Usually I work when both my girls are off for a nap. I send a few messages to our team to catch up on where we're at.

Then I will spend 10 minutes reading up on the issues of my marketplace. I reach out to a few friends and close colleagues. We go for an afternoon family walk together in nature, go to the beach, swim in the pool, or do something together. I bring a pen and a paper to organize my best ideas. As a general rule, we try not to bring any phones or technology. We like to be present with each other.

Sometimes my lady and I have sex in the middle of the day. It’s a special treat. Later in the afternoon I work on learning something new. Lately I’ve been learning piano and speaking German, French, and Spanish. I also read up on investing, which is something I am getting into more and more. At night, we all have a healthy delicious dinner together. I sometimes play some songs on my guitar for my girls while they dance. We share lots of laughs and enjoy our time together.

Because this is an *average* day, it is perfectly *sustainable*. Each of those items takes just a few minutes to enjoy. I genuinely feel blessed because I am. Although I am extremely fortunate, I am not “lucky”. I have directly chosen these experiences. You choose your experience in the same way.

What Processes Bring You Joy?

What does your *perfect average day* look like? What are the parts of the business that light you up? What do you truly love doing? How can you make your business work for your life?

How can you accomplish more by doing less? How can you contribute meaningful results to your clients? What kind of habits and routines would you need to support that? What input processes make your outcomes inevitable? How can you systematize and organize those habits so they are easy and efficient? Who can help you achieve that faster, easier, and better?

What is the perfect average day *for you*?

Chapter 16: Winning Big In A Recession

This special chapter is dedicated to winning in difficult uncertain financial times. When you can prosper in the hard times, you are financially indestructible. Dan Kennedy says, "It's only during hard times that you see who is truly naked under the tide."

Bigger Problems = Bigger Opportunities

More millionaires were created during the great depression than any other time in history. We never wish for bad economic times because a lot of people get hurt. However, there's no reason that *personally* it can't be *the greatest financial period of your life*.

Reminder: The Rich Don't Work For Money

Here's how different classes of people earn their money.

1. **Poor:** Work for a modest paycheck or a handout.

2. **Middle Class:** Work for a higher paycheck, often have a salary and benefits.
3. **Rich:** Work for control and ownership of cash flow assets.

In difficult times, recessions are like a Black Friday for acquiring assets. Cash flow assets go on sale. People who weren't open to negotiating in good times are suddenly flexible. This is the time to get control or ownership of marketing IP, customer lists, and distribution. You can also go after more traditional assets, whatever your flavor. There are lots of deals to be had on businesses, stocks, real estate, land, metals, and crypto. The goal in a recession is to acquire assets like it's going out of style. *We make our money on the buy* and realize those profits later on the sell. There is only one skill needed to get control or ownership of assets and that's *offer making*.

Having Opportunity Goggles

Not every asset comes with bright shiny lights, dollar signs, and gold ribbon. Often there is a fine line between deal and dud. The difference between a liability and a cash flow asset is a fine line. We need *the vision to see what's possible* and a little elbow grease and creativity.

For example, let's illustrate the point using a traditional real estate asset. Let's pretend we found a house in Ohio. The house is worth around $250k. The owner recently lost his job in the recession. After 17 years of making payments, he decides to walk away. He still owes about $104k. Before he could sell, the home needs at least $10k in repairs and he doesn't have the cash to fix them. The bank has been sending threatening notices because he's $3k behind on his payments. The monthly rental price in the area has gone down to $1000/month. His payments every month are about $1200/month.

At first glance, there are a few things wrong with this deal. Renting it would lose $200/month and create landlord headaches. The house isn't in sellable condition. He's behind on payments. It's a recession and the home may not be easy to sell, even though there's equity. With only the facts of today, it doesn't scream "tremendous opportunity".

That's where having *the vision to see what's possible* comes in. How could we make this deal profitable? Could we control the asset? Could we offer to take over payments and then find another investor who wants to fix and flip it? Could we sell it owner-financed for $20k down and monthly payments of $1500? Could we help the owner refinance the home, catch up his payments, make the necessary repairs, and split the profits after we sell it? Could we rent the garage as storage for extra cash flow? Could we turn it into an AirBNB to get more than $1000/month? How could we turn this asset into positive cash flow? There are no right answers. The only limit is our own creativity.

When cash flowing assets, the basic formula is pretty simple.

1. Have the vision to see what's possible.
2. Make an offer to buy or control it.
3. Add value to it.
4. Sell or finance for cash flow.

Adding Value To Assets

There are numerous ways we can take an asset and improve it to make it more valuable.

- Can we make it more valuable by *increasing the distribution*?

  This works especially well for marketing IP and related assets. For example, if you get control of a course that's already sold previously, then simply putting it in front of more eyeballs will make the course more valuable.

- Can we *add another cash flow stream*?

  This is the power of the customer list. There are lots of other things the same people will buy. We can keep adding more cash flow streams to the same list by just serving more of their related needs.

- Can we *improve* it?

  Sometimes just adding a few bonuses or templates can make intellectual property significantly more valuable.

- Can we *finance* it?

  I have several mentors who buy land at 10 cents on the dollar that nobody wants. They then sell the same land for full price by offering it on payment terms. They get paid like the bank for years and have none of the landlord work. These deals become more valuable when the land goes from "pay me $10k now" to "$500 down and $99/month". Just changing the financing terms can make a deal more valuable.

- Can we *use other people's money*?

  In the house example, we looked at owner financing as a potential solution. With $20k down, we could potentially do all the fix ups needed. We might not have to invest a cent of our own and instead use someone else's dime. There are lots of ways we can use OPM or "other people's money".

- Can we *put the risk onto someone else*?

  If you're considering buying an email list of 10,000 people, there's no rule that says you have to pay the purchase price up front. We could make a deal where we pay $1000/month after we've generated $5000/month from the list. Then we only have to make payments after we're earning more than our costs. There are no rules. Where possible, minimize the risk.

Optimization Vs Utilization

Optimization: When we try to further refine processes to squeeze more and more juice out of the same orange.

Utilization: When we try to find more uses for an orange to achieve more leverage.

Here's why this is important. Most agency owners obsess over *optimization*, which is a losing process in the long run. I've seen many agencies try to get their ad cost down another penny. The problem is that *ad costs always go up over time*. We cannot win that battle long term. It's like taking an orange and trying to squeeze one more drop of juice out of it. Eventually you will get smaller and smaller returns of juice.

When we focus on *utilization*, assets generally become more valuable with more use. When I was first breaking into the lawyer niche, I tried content ideas inside of Linked In groups for lawyers. I threw a lot of spaghetti at the wall and had lots of strikeouts. Most of my posts got no comments or likes and very little interest. One day a post about the “5 secrets of the world’s most successful attorneys” blew up. I woke up to over 200 comments. I eventually took that winning concept and turned it into a successful webinar, Facebook ad, in person speech, YouTube video, Linked In outreach pitch, and email newsletter. This is a utilization example. We increase asset value by finding more uses for the same asset. The working content got more valuable each time we found a new use for it. It’s like taking an orange and replanting the seeds to grow more oranges, selling orange stock photos, and using the orange peel to compost a garden. We get larger and larger returns out of the same orange.

Combining Mindsets: Investor And Partner

There is a powerful mindset shift in all of this. It’s when we stop seeing ourselves as “service providers”. Instead we see ourselves as a combination of *investor* and *partner*. This means we approach each client, on equal footing, as a partner would. We also simultaneously look for opportunities to do things once, so we can get paid again and again. We also get control or ownership of intellectual property. We add value to these assets. This is a completely different way of looking at an agency. I believe it's the best way to achieve long term wealth. I go deeper on this in my second book, Passive Automated Recurring Income.

Be a source of cash flow. Even in hard times, you will be in demand. Be prepared. Build your recurring client base and assets. During the worst of times, you will succeed even more. Sources of cash flow can always write their own ticket, anytime and any place. Write your own destiny.

If you've gotten value from this book, leave a 5-star review on Amazon. This helps other people know this book is a useful resource for agency owners. By sharing key principles, it also helps you better retain the big ideas.

Chapter 17: Review Of Key Concepts

Here is a review of the key concepts in this book. Let's compare the old way and the new way of doing things.

Old Way	New Way
Business owns them Spend days staring at computer screen and phone.	**Lifestyle agency** Time. Flexibility. Do what you love. Travel. Enjoy life.
Clients choose me Settle for who they think they can get, usually anyone with a credit card.	**I choose my clients** Choose people that are fun, profitable, & easiest to help.
Exist only to make money Treat people like a credit card with legs.	**Have a purpose in the market & make money** Operate from a small but meaningful why.
Meetings Booked appointments, client meetings, and employee interviews.	**Meeting-less** Phone-less sales, expectations, and trial assignments.

Broad or no niche Focused on a specific client deliverable like SEO or paid ads.	**$100 bill sub-niche** Focused on bringing highest value clients within a sub-niche.
Custom Reinvent the wheel with every client > 50-80 hour weeks.	**Customization** "Here's our system. We customize 10-15% to fit your unique needs." Reuse.
Multiple clients Perpetual energy required to create brand new solutions.	**1 Client. 1 Problem. 1 Solution. 1 Deliverable.** Initial effort required, second time reuses assets.
Paid for time, energy, & effort Their biz only works with the Gary V hustle hamster wheel.	**Work with leverage, systems, & assets** Delink time and money structure.
Doing "Our monthly SEO includes 200+ backlinks and 50+ articles."	**Gets Done** "We'll get you #1 for your $100 bill sub-niche."
Hard selling "If you decide in 5 minutes, there's a $2k	**Irresistible Offer** Offers so damn sexy they sell in a Google doc. No

discount."	proposal or phone call required.
Inside a rigid box "I do FB ads/SEO/Adwords/Web Design". You and everyone else.	**Mini monopoly** "We are the only ones who offer [end result]". In demand.
Builds Frankenstein funnels Hey you're just one funnel away, right? (Not really.)	**Simple direct offer-driven funnels** Real people. Real buying conversations. Real offers that work.
Pitch strangers on marriage "You just met me... now sign here for my 12 month SEO package".	**Offer first dates before marriage** Makes 'yes' easy. Pick and choose who is fun to work with.
Replace Create a better mouse-trap and replace existing mousetrap providers.	**Add on** Add on to existing infrastructure and innovate.
"I've heard that before" Sell solutions exactly the same as competitors.	**New and exciting way out** Innovate and sell something unique and new.

Sell Hammer "We do SEO, paid ads, websites, copy, funnels, videos, etc."	**Sell outcome** "We are the only ones who can bring you [$100 bill outcome]."
Target everyone in niche In the dentist niche, target client is "any dentist".	**Target shoe buyers and shoe stores** Hand select the proven buyers and power partners.
Low margins Often have to fill gaps with cheap VA help and mediocre talent.	**High recurring margins** Allows for trustworthy people to take work off your plate.
Priced competitively Priced to be competitive in the marketplace.	**Premium pricing** Unique premium solutions.
Hides Pricing Believes clients can't understand price without context.	**I-V-Q Formula** Gives clients the context to understand price up front.
Puts all the risk on clients Clients are expected to accept all the risk in deals.	**Manages risk** Tests clients and deals small to look for big upside.

Convert strangers only	**Up-sell and add value to buyers**
Convince only the hardest, most difficult prospects. Front end only.	Easier & far quicker to produce results. Back & front end together.
1 time sales only	**1 time sales > recurring > passive automated recurring income**
Frequently selling, hustling, and grinding but doesn't get ahead.	Turn sales into lifetime clients & recurring cash into passive income.
Clients frequently leave	**Repeat business**
Always need new sales and leads to keep the biz afloat.	Can sustain the biz without any new front end leads or deals.
Throw clients away	**Value clients for life**
Most clients stay 90-120 days. Always "selling". Endless grind.	Turns 1 time customers into repeat customers for life. Have waiting list.
Booked appointments	**Phone-less sales**
Requires lots of time, good sales people, and sales tactics.	Requires a Loom video or a Google doc with an irresistible offer.
Volume lead gen	**Less but better lead gen**

Often sends 1000's of untargeted outreach messages every day.	Narrow down to shoe buyers and personalized irresistible offers.
Dependent on 1 lead source A FB ad account shut down is usually fatal.	**Thrives in any economy** Built on principles that never change.
Describes Often uses buzzwords like "more sales/leads/customers".	**Dramatic demonstrations** Shows a visual picture of what outcome looks like.
Client expectations unspoken Expected timelines and results are in the agency owner's head.	**Communicates clear expectations** Clear outline of results, time, cost, communications, and client inputs.
Reactive communication Send a monthly report. Meetings when clients demand them.	**Proactive communication** Radical transparency. Keep clients informed before they ask.
Bend over for client demands Clients demand constant phone calls, meetings,	**The benevolent dictator** We set the rules of engagement and

and updates.	expectations. No meetings or calls.
No extras Provide basic ads/SEO/design + monthly report.	**Wow client experiences** Go way above and beyond the call of duty. It's the little things.
Customer Service Reactively responds to client issues as they arise.	**Department of gratitude** Proactively shows clients their business is appreciated and desired.
No upside Better client results mean same monthly retainer.	**Asymmetric risk** Invest time and energy into big upside client deals.
Sally Seller or Recurring Randy Trades services for single or recurring payments.	**Compound Carl** Recurring payments, acquires assets, and compounds income.
Processes in the owner's head Owner is the only one who can do a lot of the key business processes.	**Detailed systems and processes** World class documentation "McDonaldizes" the business.
Chaotic to manage	**Smooth systematic**

Putting out fires. Can't turn your phone/email off for a weekend.	**operation** Elegant simplicity, processes & procedures, automation, & great staff.
Just 'good enough' employees and freelancers Then wonder why it's easier to just do it yourself.	**Hire, train, and retain superstars** Get the right fit. Treat them like family. Reward them to stay.
Employee interviews Hires based on how well a person does in an interview.	**Trial assignments** Hires based on testing people in real world situations.
Works for sales and pay Can only earn after a client pays them.	**Works for pay and control and ownership of assets** Earns recurring from clients, IP, distribution, and returns on investment.
Optimization “I'll be profitable if I can just get my ad costs down another penny.”	**Utilization** “I've got this thing working. How can I get more use out of it?”
Service provider Works for clients.	**Partner and investor** Invests and partners in

clients businesses
strategically.

If you're interested in getting help implementing all this for your agency, we have a paid mastermind known as the *WolfPack*.

How It Works The WolfPack Way

Step 1 - Choose A $100 Bill Sub-Niche

Specialize in the most valuable product or service within a niche, so that we *work once* and *get paid twice,* delivering the same solution over and over.

Step 2 - Make Your Premium Offer Easy To Say "Yes" To

Most peeps have low value "me too" offers. They need "convincey" sales calls, webinars, proposals, etc. We get "yes" from a Google doc or Loom video and get more money without sales calls.

Step 3 - Validate The Offer With Simple Buying Conversations With Shoe Buyers And Shoe Stores

We use simple direct conversations with key decision makers. Our buyers write our copy and messaging for us.

Step 4 - "McDonaldize" The Delivery & Build In Some "Wow" Factor

We "multiply" our efforts by documenting our efforts step-by-step. Our systems duplicate our output. Working smarter, not harder.

Step 5 - Build A Team To Multiply Your Wow

We build a team of your people with your values to deliver consistent premium client results for you. It creates great experiences on autopilot.

If you’d like help implementing all this, you can learn more about our WolfPack mastermind at beyondagencyprofits.com/wolfpack

Chapter 18: Beginning With The End In Mind

What is the purpose of your agency? How does it serve the bigger picture in your life? Does it work for you or are you working for it? Does it build freedom and acquire assets? Does it bring you joy, happiness, and fulfillment?

Most people *settle*. They run an agency and live a life that is about settling. They settle for the clients they think they can get and then they eek out a decent living providing an average service. Just to be clear, there is absolutely nothing wrong with that. It's just a very hard way to make a living. It's also not very fulfilling. It's a lot of "grinding" month after month. It's also "damned if you do and damned if you don't". Why? Because it will create either money or time. With the old model, we almost never get both together. Success can drown you in unending busyness and lack of success will make you worry about a lack of cash in the bank.

What you are creating for yourself is something altogether different. It involves your *conscious intentional decision*. It is *your decision to live on purpose*.

Choosing To Live Consciously, Intentionally, And Purposefully

It is choosing to live the life you were meant to live. It is living your reality on your terms. It is *creating a meaningful difference for your clients* and *adding value* to the world in a strategic *leveraged* way.

You are creating success in both money and time together. That harmonious balance always has a trickle down effect on your relationships, confidence, families, spirituality, and other aspects of your life. You are doing it in a way that provides real lasting fulfillment.

Dare To Dream A Life Worth Living

If you could snap your fingers and have your dream agency now, who would you work with? When and how often would you work? What would you do? Where would you most love to do it? What do you absolutely love about it? What kind of difference are you making in the world?

Think long and hard about your answers. Because they form the basis for what kind of agency you can have. You must first hold it inside yourself as possible. You must see it in your mind before you can see it out there. Then *live it* as your everyday life. You deserve the best life possible. Dare to dream. Live big. Live on purpose.

May the force be with you.

About The Author

Since 2007, Frankie Fihn has built 3 different agencies to 100+ clients. He has also mentored 100's of agency owners to live the less laptop, more beach lifestyle.

He has been in digital marketing since 2007. He is a shaman, speaker, author, entrepreneur and world traveler. He has been featured with the world's number one marketer, Jay Abraham. He has also written for several magazines, he has been featured in numerous podcasts and articles, and he has spoken on stages all across the world. His approach covers lifestyle design, asset creation, client selection, leverage, and purpose. He invites his readers to email their thoughts at frankie@beyondagencyprofits.com.