9 STEPS TO A MULTI-MILLION-DOLLAR AGENCY

OVERVIEW

9 STEPS TO A MULTI-MILLION DOLLAR AGENCY:

1. TRAFFIC GENERATION – How to get a consistent lead flow of more qualified leads for your agency
2. 6-FIGURE PROPOSAL – 12 Step Formula that guides you through creating the perfect proposal for clients
3. BRAND POSITIONING VORTEX – How to build credibility for your brand so you can dominate your industry
4. 3 Ms OF PRICING – How to increase your prices 10-20% overnight
5. PROJECT MANAGEMENT – Our proven project management system that crushes scope creep
6. SALES AND MARKETING AUTOMATION– Constructing proposals that convert top-dollar clients. Lower your labor cost, create happier clients, and get more reviews and referrals
7. 7 STEPS OF HIRING – Our proven 6 step process to getting the right employees the first time
8. AGILE AGENCY LEADERSHIP- Give you the 5-setp framework that allows your agency to be more agile and flexible, while having less responsibility tethered to you
9. KEY PERFORMANCE INDICATORS – Track the items that lead to bigger profits and working with the right type of clients

HANDYMAN HOOKUP

Keep a lookout for our Handyman Hookups. These are kickass nuggets that will make the "Explosive Growth" process a lot easier for you. I give you a few of these sprinkled throughout our 9 Steps to a Multi-Million Dollar Agecy so you can get a few of the little tips and tricks I learned while building my agency.

TRAFFIC GENERATION

When it comes to traffic, it's about **quality** over **quantity**. To ensure that you're getting the best traffic for the lowest price, there are a couple of things you must learn first. We will touch on P.O.P framework, Guerrilla Marketing Warfare, Top 30 traffic generation sources, and which KPIs are needed to evaluate those sources, but the ***Agency Blueprint*** has an in-depth workbook with more information. It even includes common mistakes to avoid when generating traffic!

POP FRAMEWORK

1. **Pay for it Now-** Requires more investment upfront, but is a requirement to build a sustainable and fast-growing agency.
2. **Ongoing Effort-** Requires a long-term strategy and takes longer to build, but usually pays off at a higher rate with a longer lifecycle.
3. **Pat for it Later-** Typically includes referral partners, joint ventures, or affiliates that pay out after traffic has been generated. The ability to track all leads and sales makes this a favorite.

GUERRILLA MARKETING

Going after conventional goals using unconventional tactics.

Your prospects only have so many money to spend, and they're only going to spend their money with **one** agency. It should be your mission to aggressively go after each and every one of those prospects. Get creative, think outside the box, and remember: this is **warfare.**

TRAFFIC GENERATION SOURCES

- **Facebook Ads**
- **Google Adwords**
- **Community Outreach**
- **Billboards/Street Signs**
- **Search Engine Optimization**
- **Podcasts**
- **Email Marketing**
- **Refer a Friend Program**
- **Referral Partners**

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TRAFFIC GENERATION

TRAFFIC GENERATION KPIs

You should never set up a traffic source and forget about it or assume that it's working simply because it worked in the past. Your agency should constantly monitor the results of all traffic generation campaigns.

BELOW ARE THE 11 KPIs THAT SHOULD BE TRACKED:

- **Media Budget Spend**
- **Total Visitors**
- **Bounce Rate**
- **Opt Ins**
- **Lead-to-close Ratio**
- **Initial Investment ROI**
- **Total Cost of Project**
- **Total Project Profit**
- **Client Retention Ratio**
- **Total Client Life Cycle Value**

As you can see, traffic generation is one of the hardest pieces to building a sustainable agency. It's also arguably the most critical piece. I learned this lesson the hard way, but it's always better to have more leads than you can handle. It puts your agency in the driver's seat as it pertains to pricing, positioning, growth, scalability, venture capital investors, potential buyers.... and so on.

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PROPOSALS

Do you have a hard time closing bigger deals due to competition, or experience scope creep in a majority of your current projects? My proven proposal template will get the budgets right every time while eliminating 90% of the competition. I am going to list the 12 steps involved with the proposal, but for a downloadable template, visit our website on the ***Agency Assets*** page.

1. **Overview/Introduction**: Brief overview of the proposal and all it entails.
2. **Definitions:** Define marketing terms: Explain industry jargon - clients might not be familiar with what we consider "everyday language."
3. **Guiding Philosophy**: Why do you do what you do? Define your higher purpose.
4. **Define Target Audience** and their needs: Who are you targeting and what do they want?
5. **Outline Existing Assets and Processes**: Explain what they are doing wrong (Pain Points).
6. **Strategic Recommendations Overview**: Overview of why and what you're recommending.
7. **Project Timeline**: Outline specific phases of the project.
8. **ROI Projection**: What you expect to be the outcome in traffic/leads/profit increases.
9. **Upfront Capital Investment & Ongoing Retainer/Residual Investment**: How much is it going to cost?
10. **Frequently Asked Questions**: Answer their questions before they arise.
11. **How to Move Forward**: All legal documents and final steps.
12. **Executive Summary**: Wrap everything up and convince them if you haven't already.

By following this formula when creating your proposals, you will be securing bigger deals with better clients in no time! While you can download a template on our site, if you are interested in a fully customizable version plus a workshop with me, you have to check our website for details on the Proposal Template Workshop. I am so confident that you will see a difference by just adjusting my proposal template, I am offering it as a standalone workshop where I walk you through how to get the most out of the formula!

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AGENCY BRAND POSITIONING

Brand positioning is what separates you from your competitors, builds value in your brand, and makes you the only choice as far as your target audience, or customer avatar is concerned. It is very important to understand brand positioning and to have a game plan in place to ensure your agency is working toward being the only option for your target audience. Some of the items required to build a world-class brand positioning are easy, while others are harder to get in place. All of them require a strategy and a plan of attack.

Brand positioning is so important because it helps you do more with less. In other words, you spend less on media buying and you close more big money projects. We have created a very simple 3-step process to help you determine exactly what your agency's brand positioning should focus on, and how to get it implemented.

1. BRAND ANALYSIS

First you must figure out your target audience's wants, their desires, and what their pain points are. Then, your agency must define what you are capable of. Be sure to be truthful with yourself. Finally, you must understand what you are going up against, so research your competition very deeply.

2. CREATE YOUR BRAND POSITIONING STATEMENT

Your brand positioning statement is internal language that guides your agency's efforts. It is there to make sure everything you do aligns with how you want to be perceived by your target audience.

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AGENCY BRAND POSITIONING

3. IMPLEMENTATION OF BRAND ASSETS

Now that you have gone through the first two phases of creating a brand positioning statement, you should have a simple statement that reflects your agency. It is time to bring your plan to action, and in the ***Agency Blueprint***, we provide you with a positioning checklist that walks you through specific steps that will get the most out of your brand positioning campaign.

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AGENCY PRICING

Pricing is a very complex topic and a majority of agencies underprice their services. Lucky for you, I figured out that it boils down to three simple concepts: **The 3 Ms of Pricing**. By implementing these components, you can increase your prices by 10-20% in the next 90 days!

3 Ms OF PRICING

1. ***MARKET VALUE***
2. ***MATURITY***
3. ***MODEL (PRICING MODELS)***

The hardest part for you, the agency owner, is to get out of your own way.

The best way to justify raising your prices is by building as much value as possible. In the ***Agency Blueprint***, I go into detail showing 15 different ways to build value for your agency. Those 15 ways can be broken down into 4 separate categories:

1. INCREASE DEMAND

Increase your lead flow or revenue through delivering overwhelming value to your clients.

2. PROVIDE CLARITY

Provide clarity for your prospects or clients by providing a detailed project management process or a systematized method of delivering more effective Google Ads.

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AGENCY PRICING

3. ROI/RESULTS

Provide your clients with detailed reporting on the results they will receive as a result of hiring your agency.

4. PERCEIVED VALUE

This can be done in countless ways, but get started with world-class proposals, presentations, videos, social proof, and social trust items.

After adding value, it is important to consider the age of your agency in regards to business development when pricing as well. The three different levels of maturity are:

1. **Start-up**
2. **Awkward growth**
3. **Mature Agency**

Finally, it is important to find what type of pricing model best suits you and your agency. There are tons of different types of models, but I have found that the following 6 are the most common and easiest to implement.

1. **Fixed Bid**
2. **Hourly**
3. **Monthly Retainer**
4. **Value Based**
5. **ROI (Results) Based**
6. **Package Deals**

HANDYMAN HOOKUP: Time, people and other perceived national publications are actually regional publications. Meaning that you can run an advertisement in one of their regional publications for cheap. Image if you put on your website, "As Seen in *Time Magazine*." Do you think that would increase your brand value proposition? Absolutely.

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PROJECT MANAGEMENT

Project Management Process That Holds Your Service Department and Clients Accountable

PROJECT CALIBRATION

You have to ensure that the handoff between sales and service goes smoothly. If this is not handled properly, it can set the wrong tone for the entire project. This is also the phase where a detailed project scope document is created and signed off on by the client.

COPYWRITING

Whether the client is providing the content or you are writing it yourself, you cannot effectively create a design concept without knowing how much copy you have to place, style, and treat.

DESIGN

Design a "wireframe" that positions the critical elements for each page you're implementing. After the wireframes are completed, begin the placement of design elements, branding, and content placement.

DEVELOPMENT

This process is pretty similar: never submit programming work to the client without having at least 2 internal quality assurance steps. Provide a checklist for the client to follow, and ALWAYS keep a very close eye on scope creep.

BETA TESTING

Once you get it to the 99% mark, schedule a time to do a personal demonstration of the site. ***NEVER*** just send over a link. Always do a personal demonstration so you can control the outcome of the meeting.

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PROJECT MANAGEMENT

FINAL PUNCH LIST

After you present the beta, send the link over and ask the client to compile a "Final Punch List." This list should be very short if your project managers did their jobs correctly.

CLIENT TRAINING

Schedule one on one training for each aspect of the website, automation, social media, or CRM portions of the project.

GO LIVE

Ensure that everything is signed off on, the client is trained, and then run one more final test. And once everything is officially ready to go, GO LIVE!

SERVICE DEPARTMENT LEADERSHIP

When managing a service department and project managers, there are a few best management practices to keep in mind. *Fly by Numbers*, *Trust but Verify*, *Zero Inbox Policy*, and *Never Stop Learning* are just a few... the rest can be found in the ***Agency Blueprint***!

HANDYMAN HOOKUP: Change orders are your friend. It is very important that you submit a change order asking for more money the *very first time* your client asks you for something that falls outside of the pre-approved scope. This is not to be mean or unaccommodating, it is to set a precedent to let them know you're watching, and they better watch what they ask for if they want to keep it within their preset budget. It is wise to do this with a small item at first, so you can in the end give them what they requested without going broke and still let them know you are watching the scope very closely because their budget (and your time) is very important to you.

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SALES AND MARKETING AUTOMATION

The following 6 campaigns make up a complete sales and marketing automated system that can be implemented to make your life and the lives of your employees so much easier. Each one gives a brief synopsis of what is necessary to create a successful campaign, but the ***Agency Blueprint*** has illustrations and drawn out mind-maps that walk you through the steps of drafting your own automated system.

LEAD HARVESTING

As an agency you need at least 4–5 lead magnets that harvest leads from your website, social media, publications or live events. All of these magnets should have automated nurturing campaigns associated to them. The Lead Harvesting Campaign is intended to deliver the lead magnet, harvest all agency performance data, and kick off the sales pipeline management process.

SALES PIPELINE

If you haven't used one before, think of a sales pipeline as a visual representation of your prospects as they are led through the purchasing process. There are a lot of ways to manage a sales pipeline, but the most efficient way is to use a cloud-based customer relationship management application. These applications allow you to centralize your data, scale your sales staff, and harvest precise agency performance indicators that allow you to improve or scale your sales efforts easily.

Pipeline Automation accomplishes: 1) requires you, the owner, to standardize your phone and email follow up processes, 2) Requires your sales reps to follow a strict sales process, 3) Saves your sales reps a TON of time.

PROSPECT NURTURING

This is a campaign that educates prospects on who your agency is, presents your prospects with social proof, social trust, community ties, and introduces prospects to the CEO. Each of these items is instrumental in the education and trust building phases of the sales process.

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SALES AND MARKETING AUTOMATION

NEW CLIENT NURTURING

A campaign that outlines all aspects of the project and contains the following items:

1. **Introduction to their team members**
2. **Project kick-off process**
3. **Communication standards**
4. **Escalation process**
5. **Project management portal training**
6. **Change order process**
7. **Refund policies**
8. **Sales and service calibration**
9. **Legal requirements**

CLIENT SATISFACTION

At the end of all projects, the project manager should kick off a campaign that engages the client in a positive manner asking them to complete a satisfaction survey. In this campaign, you must make sure that: 1) All satisfaction surveys should be seen by leadership, 2) anything below a 3 star rating is unacceptable, 3) if you receive a 4 or 5 star rating, have a review section, and 4) a 4 or 5 star rating should also be directed to a referral page.

EVERGREEN/HOLIDAY

The evergreen/holiday campaign is intended to supplement a monthly newsletter and a monthly promotional email. You will notice that the evergreen and holiday campaigns are actually independent campaigns that run in coordination with each other. The evergreen/holiday campaign will also apply for all prospects who sign up to be a client, but it will begin after they have gone through the new client onboarding campaign.

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SALES AND MARKETING AUTOMATION

Automating your marketing can lower your lead generation cost, your customer acquisition cost, eliminate follow-up failure, and can create happier clients, and get you more referrals and reviews.

We shouldn't keep funneling resources and money into marketing efforts that aren't working and aren't converting. A lot of the time, we think it takes too much time or money to implement automation in our marketing, when in actuality, it takes little time and is relatively inexpensive to automate social media postings, automate upsells and referrals, and backend following the calls to action on your website/in emails/social media posts.

Eliminating follow-up failure is another benefit of implementing marketing automation. With less possibility for human error, you'll have a smaller chance of any precious leads falling through the cracks. The more marketing touches your prospects receive, the more likely they will be to buy from you. You can't manually touch each individual prospect that many times without working 80-hour weeks, which is where automation comes into place.

Below, you'll see an example of a specific nurture process. Each category nurtures differently, because every phase of the decision making process is different.

Name	Categories
100 - DMA Owner - LinkedIn Mini Intro	100 - Lead Harvesting
200 - DMA Owner - 30-Day New Prospect Nurture	200 - New Prospect Nurturing
300 - DMA - Long Term Nurturing - Holiday Campaign	300 - Long Term Prospect Nurturing
300 - DMA - Long-Term Nurture - Evergreen Emails	300 - Long Term Prospect Nurturing

Level 100 campaigns are built to introduce your brand in a familiar way (remind them of how they met you, seminar, etc.) and setup KPI and sales processes, level 200 campaigns are built to educate and warm up new leads during the buy cycle, and level 300 campaigns are built for people who do not close during the buy cycle and need more long term nurturing before they are ready to reach back out to your agency.

7 STEPS TO HIRING THE RIGHT TEAM

STEP 1: BACKEND PREPARATION

Job Description

It's important to sculpt a job description that is both enticing and accurate. There's nothing worse than getting into a job interview and realizing that you had a complete wrong idea of the position you interviewed for. To avoid a ton of candidate turnover, be honest and brief about the position, but also give a few "fun" facts about the position that would make the candidate see themselves enjoying being part of that role. For example, we included in our job description that our office environment was similar to the TV shows *Seinfeld* or *The Office*. It's helpful to get the employee who currently is in this position to create the description if at all possible so you can get an accurate depiction of the job on a day-to-day level.

It is important to note that every step in this process is designed to eliminate future bad employees. Pay attention to how long it takes them to respond to private messages (if it is longer than 24 hours we would eliminate them from the process). If they did not fit the personality assessment criteria, they were eliminated, and so on.

Assembling Your Hiring Team

Be strategic about who you allow to help you bring on your new batch of candidates. You'll want people with different personality types, different demographics, and different levels of management to be part of the decision so you can all chip in on who would be most advantageous to your agency as a whole. Don't just throw your candidates at your HR guy or gal and call it a day. Get people who will actually be interacting with this potential employee on a daily basis so you can find someone who really blends in with the rest of your "tribe."

HANDYMAN HOOKUP – Still wishing you owned that Tow Truck Company so you can get all the hookups you can stand? Check out our ***Agency Assets*** page. There are tons of free assets to help you grow your agency.

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7 STEPS TO HIRING THE RIGHT TEAM

STEP 2: TALENT SCOUTING

INDEED, CRAIGSLIST, MONSTER, GLASSDOOR, CAREERBUILDER

The Internet is a great place to find candidates for jobs; especially if you're looking for younger Millennial employees. All of the following places are a great start: Indeed, Craigslist, Monster, Glassdoor, and CareerBuilder (and there are many more). We found the most success in Indeed.

HANDYMAN HOOKUP – We figured out a way to get the best candidates for $1. I know it is hard to believe, but we got 15 qualified candidates to schedule phone interviews for less than $30.

NEARBY UNIVERSITY

It's also a great idea to find a college or university near you to find new talent. They are young, hungry, and very moldable. You won't have someone coming in with preconceived notions about how they feel a business is supposed to operate. Consider putting up postcards on the job boards in the area of the school that holds your potential candidates (marketing, business, sales, CIS, etc.). Make sure to drop some off on tables in the common area also. Hand out pamphlets, ask them about the courses they take, get some phone numbers and email addresses and set up meet and greets, job shadows, or even interviews if you find someone right away that seems promising.

HANDYMAN HOOKUP – Get to know the professors that teach the students you are looking for, they can pick the best candidates and send them your way before a semester ends; we used to get our best talent this way.

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STEP 3: SCREENING

SOCIAL MEDIA BACKGROUND CHECK

As we all know, you can find out a lot about someone by looking at his or her social media accounts. We like to do this early in the process so we can better assess who we need to select to move forward with the 2-minute phone screening. Doing this sooner rather than later will help you find the people who care about their image to employers, and you'll figure out who is and who is not worth your time before you waste your valuable time on people who are not serious about the position.

2-MINUTE PHONE CALL

This is what we call our "make sure they have all their teeth" phone call. This phone call is not where you spend 45 minutes to an hour asking them about their work history and aspirations in life. You are simply making sure they can hold a conversation with you and can answer a few simple questions. This is not a set-date thing either. Catch them off guard. We use questions like, "Why does this position interest you?" and "Why do you think you are a good fit based on your knowledge of the role so far?" Basically two questions that validate that this candidate has a pulse and is a rational human being.

STEP 4: PRELIMINARY PHONE INTERVIEW

This is the first real-time, set-date conversation that you'll be having with your candidates. Hopefully you've boiled down your candidates to around 5-8 solid folks. You're going to want to be a little more strategic in your conversation than you have been thus far. You need to ask questions that really make them think: some that catch them off guard, but also some that help you get to know them as people. You want to get a feel for their personality as well as you can over the phone so you can see who you want to ask back for the face-to-face interview and sales presentation.

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7 STEPS TO HIRING THE RIGHT TEAM

STEP 5: ASSESSMENTS

PERSONALITY ASSESSMENT

It's important that your staff is made up of a lot of different types of personalities so you can have both the creative dreamers and the detail-oriented organizers. When you're interviewing for the position, of course it matters what type of personality holds that position, so take that into consideration. But also take into consideration having a good variety of personalities on your team as a whole. Having a good balance of detailed people and creative people is necessary. After we are impressed with our candidates in the Preliminary Phone Interview, we send them a personality assessment to see what we're dealing with, but also to see how well they can respond to an assignment.

SKILL SET ASSESSMENT

Having an assessment that determines your candidates' skill level for knowledge of your industry can help you determine how long it will take to train your new hire. As this is useful knowledge for you, your candidate's score on this assessment should not make or break their chance to work for you. I think we can all agree that if a candidate takes two weeks to get this assessment back to you but has a very high score, they aren't as appealing as the person who made your assessment a priority and got it back to you by the end of the day. That being said, the skill set assessment doubles as an ability to determine how eager your candidate is to make a good impression on you and your leadership team. Time management to get work done and submitted to you in a timely fashion is just as important, if not more important than a high score on the assessment itself.

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STEP 6: FACE-TO-FACE

INTERVIEW

You can either break up your face-to-face sessions into two separate occasions, or have one face-to-face session that incorporates both of these important pieces. The interview portion would be the part you are likely most familiar with. The biggest takeaway from this section is to choose questions that actually align with the position they are applying for. Often, interviewers take the easy way out and ask your typical, "Where do you see yourself in 5 years?" "What do you see as your greatest weakness?" types of questions. But everyone has his or her own cheesy answers to these. You'll never get a straight answer out of anyone. In order to really know who you're dealing with, ask more situational or scenario questions. Questions like, "What would you do in this scenario ____?" Determine how well they use critical thinking and problem solving in a real life situation that they will likely be confronted with in their new role.

SALES PRESENTATION

In addition to our interview, we ask our candidates to prepare a sales presentation that gives us an idea about how they perform under pressure, their own preparation skills, and again, how serious they are about wanting the position. They basically "sell themselves" for 7-10 minutes. We came up with four or five questions for them to answer during their presentation that gave us an idea of how well they would fit in around the office: asking them what their greatest asset would be for this particular position, getting them to do homework on our company and what we do, and so on. We have a few tips and tricks up our sleeves to turn up the heat in the moment, but you'll see those in the ***Agency Blueprint***.

STEP 7: OFFER

Call your top candidate and offer him the position, but do not tell the other potential employees no until you get a response. From then, a 90-Day Contractor/Internship is a good option to see how they fit into your agency's culture.

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AGILE AGENCY LEADERSHIP

Back in the day, the leadership would spend a small fortune creating a vision statement and then put it into a poster and tell everyone to love it, live it and breathe it! Well, the days of "Ivory Tower" leadership are over! In todays society, it is critical to have your entire tribe sincerely believe in your vision. The five core components of your agency vision:

1. **Core Values**
2. **Purpose Statement**
3. **Mission Statement**
4. **Tribe Alignment**
5. **Visualization**

CORE VALUES

Your agency's core values come from inside of you. As the leader of your agency, you imprint your personal beliefs and values onto all aspects of your agency, especially your employees. **This is the crucial aspect of your core values—they must be an authentic extension of the values you live by every day.** These are the values that guide you and keep you strong regardless of external influences attempting to steer you in the wrong direction. Core values will stand the test of time—they should be almost identical in 100 years. You will hire, fire, train, give raises, promotions and determine the direction of your agency based upon how the ideas and decisions stack up after being filtered through your core values.

It's important to stick to only a few core values so you can be as consistent as possible. It can be hard to narrow it down to just a few. I like to do the "suitcase" exercise. Have a long list of values, and imagine that you're going on a trip where you can only fit 5 of them in your suitcase. That helps you pick the ones you simply cannot live without, and then vote on them as an organization to promote the Tribe Alignment mentality. Inclusiveness is key to loyalty within your group. From your core values, your purpose and mission statements can begin to take shape.

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AGILE AGENCY LEADERSHIP

PURPOSE STATEMENT

The key takeaway from developing a core purpose that works is to realize that you have to know who you are before you know were you're going.

Your agency's purpose statement should reflect you and your employees' personal purposes that are held deep within. Great leaders live with a higher sense of purpose: something that drives them to achieve greatness until they die. They constantly strive for greatness, but of course never arrive at a particular destination. However, their drive to achieve greatness constantly propels them to greater heights.

It is a good practice to keep it 7-8 words if possible, but if you can't get it that short, don't compromise the concept for the brevity.

When creating an inspiring and compelling purpose statement, make sure you don't make the mistake of simply stating what you do. For example, "We exist to make websites for small businesses." There is nothing inspiring or compelling here. Your purpose statement needs to **inspire** and **motivate** more than anything.

MISSION STATEMENT

Your mission statement consists of your **Big Hairy Audacious Goal** (BHAG) and a visualization of that goal – or, vivid "word pictures" that display what it would be like if you actually reached that goal. You should have a very specific 3-7 year goal that seems almost unattainable. Your BHAG is a huge, intimidating challenge, not just the bare minimum. Not something that you know in the back of your head could be done 100% - something that has about a 50-70% chance of happening. Your BHAG should be strong and captivating – something with a clear finish line, something that engages people, something that takes little to no explanation to understand.

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AGILE AGENCY LEADERSHIP

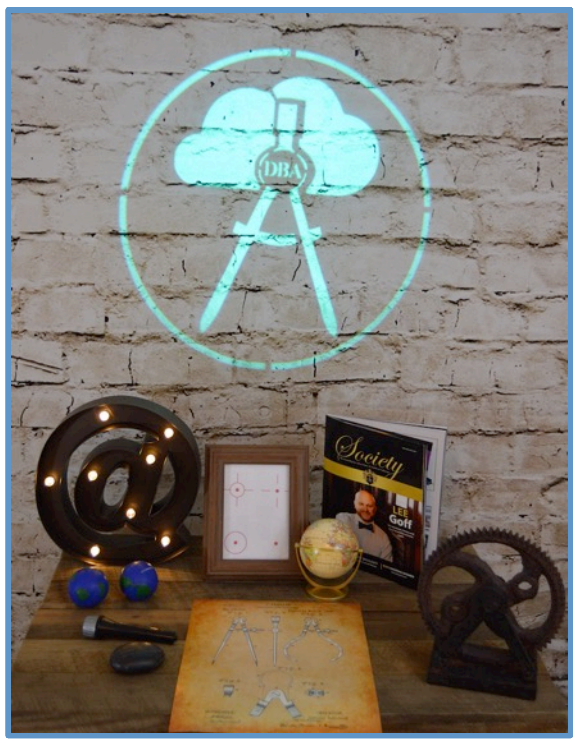
TRIBE ALIGNMENT

The days of the ivory tower are over. If you truly want your employees to buy into your agency's vision you must get group buy-in, or what we like to call, *Tribe Alignment*. When creating your agency's vision, it is critical that you get everyone's input and that they feel like they are part of the creative process. If you sit in a room and come up with the vision statement with a few key leaders, not everyone will take ownership.

In today's globally competitive environment, your employees have to envision the future of your agency themselves, and they have to be part of the process that creates the vision.

VISUALIZATION

This is one of my personal favorite parts of creating your vision as an agency. You physically create an environment that encourages reaching your BHAG. For example, hitting a gong when a sale is made, having wall decals of your core values plastered to the walls, T-shirts with your brand all over them, pens, pencils, mouse pads, you name it. The image to the right shows you a few of the things we use as visualization tools in our office here at Digital Business Architects. Not all of them will make sense to someone outside of our company, but that's how it's supposed to be. Your visualization tools are supposed to be meaningful to everyone within your agency.



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AGENCY PERFORMANCE INDICATORS

To keep an accurate pulse on your business's financial capabilities, it's necessary to track of the three components of Agency Performance Indicators: Expenses, Revenue, and Customer Acquisition Cost (CAC).

EXPENSES

Expense tracking can range anywhere from your static W2s, to your 1099 costs, your event costs, your day-to-day operating costs, advertising costs, etc. It's important to keep everything organized in an object-oriented fashion: see how much you're spending on every type of employee – part time, full time, hourly, volunteer, intern, etc. Also see how much money those employees bring in versus how much it costs you to keep them around. This will allow you to cut an estimated 5-10% off of your expenses. With a detailed record of your expenses, you'll be able to see what's really important and what isn't. (Includes **Payroll** and **Office Operations**.)

REVENUE

This doesn't refer to how much money came into the bank account at the end of each month. This means knowing where the money came from, how it got there, and how you can get more of it from the same or a similar well. You need to know how much came from residual income, project work, referral fees and pass through project work. (Includes **Residual** and **Project Revenue**.)

CUSTOMER ACQUISITION COST

The top three channels (when you're looking to acquire new clients) are social media engagements, speaking engagements, and advertising. Try not to think of this as an expense. Instead, CAC refers to finding leads, closing those leads, and then creating paying customers. This should be at the top of the list if you're thinking of scaling or selling your agency. Your success will be determined by how much it costs you to get business in the door. This is much more detailed than simply throwing it in as a line item under the expenses category. (Includes **Lead Harvesting** and **Lead Nurturing**.)

LEARN MORE

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AGENCY PERFORMANCE INDICATORS

On this page, you'll see an example of KPI tracking dashboards. Having dashboards similar to these where you can view your KPI data in real time is simply invaluable to you and your agency.

You can use cloud-based software like Google Drive to keep all your KPI data together. Your KPI data can be edited in real time on Google Docs or Google Spreadsheets by those who have been granted access 24/7, on any device. That way, everybody who needs access to the data can have access with just a few clicks, and with the correct login credentials, you can access it anywhere, any time. Gone are the days of your work being stuck away from you at the office when you're on a business trip, and gone are the days where the one guy in your office who knows accounting like the back of his hand is sick, and nobody can access important data.

TAKE ACTION!

Now is the time to take action.

If there is anything in this guide that stuck out to you, or anything that you think could use some improvement in your agency, feel free to reach out.

I love sharing the knowledge and experience I gained building my first agency, and my passion now is to help other agency owners achieve their wildest dreams and grow beyond what they ever thought they could.

Please give us a call in our office at:

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Our Purpose:

We Are Here to Serve You