

Going from Anxiety to Clarity

Part 2



Welcome to Part 2!

Share in chat:

If you had one, **what was your 'aha' moment from Part 1?**

AGENDA for Part 2

Promise for today: You'll get at least ONE thing that you can apply for 2024.

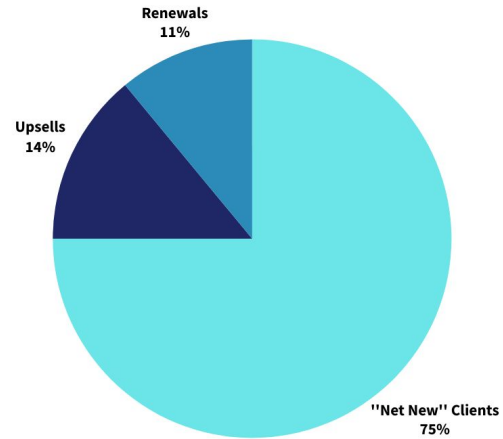
- **Check-in: Your ideal 2024**
 - The numbers *and* your quality of life
- **Tips: 12 ideas to try in 2024 (pick 1-2!)**
 - 6 longer-term ideas, via Tom
 - 6 quick-win ideas, via Karl
- **Applying the advice (and a short break)**
 - Homework to help you build momentum
 - Q&A to support your growth

**“Everything looks easy till you
start doing it.”**

Michael Che

What is your agency's top bizdev priority in early 2024?

Sample: The first 28 respondents in Slack... final was ~77% "Net New"



Homework check-in

Raise your “Zoom hand” to optionally share:

– You explored:

- Your ideal 2024 (aka ‘Advance Retrospective’)
- Your 2024 revenue goal *and* mix (e.g., Renewals, Upsells, and “Net New” Clients)

– SHARE: What did you notice?

- Setbacks are OK... but what next?
- You don’t need to publicly share the \$\$\$ goal.

Choose Your Own Adventure:

**Pick 1-2 options, from 12 ideas
(longer-term and/or quick-win)**



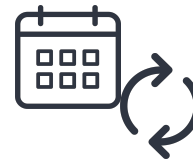
6 longer-term ideas to try

(but don't do all of them at once!)

Tom's suggestions:

1. **Quarterly Business Review**
2. **ICP Focused Sequences**
3. **Tradeshows & Conferences**
4. **Thought Leadership Video Series**
5. **Intent Based Marketing**
6. **Reposition with Industry Focus**

Quarterly Business Reviews



Effort: 2 - 4 weeks

Impact: \$1M in Retention & Expansion Revenue

Objective

Grow and retain our best accounts by adopting best practices for Quarterly Business Reviews so we can take a proactive, leadership role in their strategy and execution.

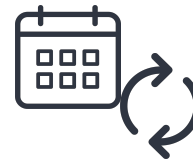
Results

- All Strategic Accounts Identified
- QBRs held with each Strategic Account
- 135% of 2024 Existing Customer Revenue Target identified

How we'll get there

- Identify Key Accounts
- Forecast Revenue, booked & target
- Develop QBR Template
- Assign Cross Functional Account Teams
- Leverage Internal Review Sessions
- Drive customer QBR Sessions

ICP Focused Sequences



Effort: 4 - 8 weeks

Impact: 50 New Leads per Month

Objective

Develop relationships and engage prospects more consistently by systematically providing valuable thought leadership to prospects or leads in our ICP.

Results

- 20% increase in email open rates.
- 15% uplift in lead-to-customer conversion.
- 30% growth in targeted content engagement.
- 25% rise in repeat client interactions.
- Achieve a 10:1 ROI on campaign spend.

How we'll get there

- Identify Ideal Customer Profile (ICP).
- Develop targeted, relevant content themes.
- Create engaging, industry-specific media links.
- Build sequenced, personalized communication templates.
- Integrate content into HubSpot sequences.
- Monitor, analyze, and adjust strategies.

Tradeshows & Conferences



Effort: 8 - 12 weeks

Impact: 50 New Leads Per Quarter

Objective

Build new relationships with key leaders our focus market through actively participating in the communities that our Ideal Customers are engaged in.

Results

- Lead Generation: Generate 15 new qualified leads per conference.
- Post-Event Engagement: 20% increase in follow-up communications with new contacts.
- Speaking Engagement Impact: Achieve 25% audience engagement in presentations
- Networking Success: Secure at least 10 meaningful connections per event.

How we'll get there

- Identify relevant trade shows/conferences.
- Research attendees; target key leaders.
- Schedule pre-event connection invitations.
- Secure speaking or participation roles.
- Prepare engaging, industry-specific presentations/materials.
- Follow-up post-event for relationship building.

Thought Leadership Video Series



Effort: 4 - 6 weeks

Impact: 36 New Qualified Leads in the first 6 months

Objective

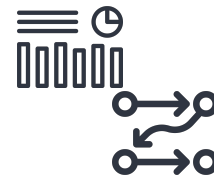
Build demand in our market by establishing ourselves as thought leaders & leveraging a series of short videos to share our knowledge and experience with the community.

Results

- 2 Videos Per Month
- 500 Views Per Video
- 50% Increase in Web Traffic
- 6 New Leads Attributed from Videos Per Month

How we'll get there

- Identify Key Topics
- Plan Content Structure
- Film Engaging Videos
- Optimize for SEO
- Share Across Platforms



Intent Based Marketing

Effort: 2 - 3 weeks

Impact: 30 new leads in the first three weeks

Objective

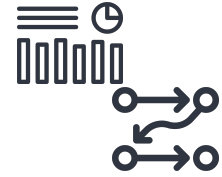
Identify and connect with business leaders that are actively pursuing the services that we provide by leveraging modern tools and technologies for intent based marketing.

Results

- 10 new prospects enrolled per week
- 1 new lead for every 10 prospects enrolled
- 2 new projects for every month of marketing!

How we'll get there

- Identify Ideal Customer Profile (ICP)
- Determine Key Intent Signals
- Setup Zoominfo, Configure Intent Signals
- Design Simple Outbound Campaign
- Identify Prospects (weekly)
- Engage Prospects with Multi-Channel approach
- Stay Compliant! (GDPR & CCPA)



Reposition with Industry Focus

Effort: 10 - 24 weeks

Impact: Increased revenue by 50% and margin by 100%

Objective

To become a specialized leader in a chosen industry, enhancing market share, client relations, and profitability through tailored solutions and distinct market positioning.

Results

- Growth: Expand client base in target industry.
- Market Share: Achieve dominant position in niche.
- Profit Margin: Increase through specialized offerings.
- Client Retention: Strengthen long-term relationships.
- Brand Recognition: Establish as industry expert.

How we'll get there

- Identify Target Industry
- Analyze Market Trends
- Develop Unique Positioning
- Redesign Brand Elements
- Tailor Service Offerings
- Launch Marketing Campaign
- Monitor, Adjust Strategy

Short break...

6 'quick-win' ideas to try

(but don't do all of them at once!)

Karl's suggestions:

1. **Pricing:** Draft a [price-increase strategy](#) (for new clients now, and current clients later)
2. **Processes:** Ask your team which frequent activities [need a better process](#)
3. **Qualification:** Review your [sales screening](#) process (including what you ask, when)
4. **Feedback:** Pay a client or "lost" prospect to review your [online footprint](#) as a buyer
5. **Networking:** [Export](#) your LinkedIn contacts (and review [past clients](#)) for TBD outreach
6. **Wild Card:** Pick something else!

Homework

Keep up the momentum:

1. Pick 1-2 ideas from the list of 12.
2. Enlist a team member to serve as the PM, including building a project plan.
3. Post your homework commitment(s) to Slack, to make them more 'real'.
4. Support each other in Slack—open from now through January 31st.
5. Check out Bureau events for 2024.

Extended Q&A: How can we help?

And take a moment to connect with Tom and Karl



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