

Get Your Agency's S**t Together

Marisa Smith, Head Brainiac
The Whole Brain Group
@wholebrainprez

A Little History



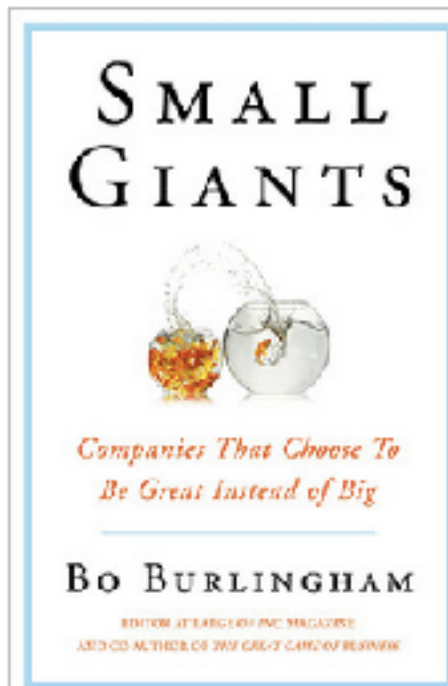






The Inspiration

The Inspiration: Small Giants



SMALL GIANTSSM
COMMUNITY

Leadership - Company leaders know who they are, what they want out of business, and why.

Community - The Company is deeply rooted in the communities in which it does business.

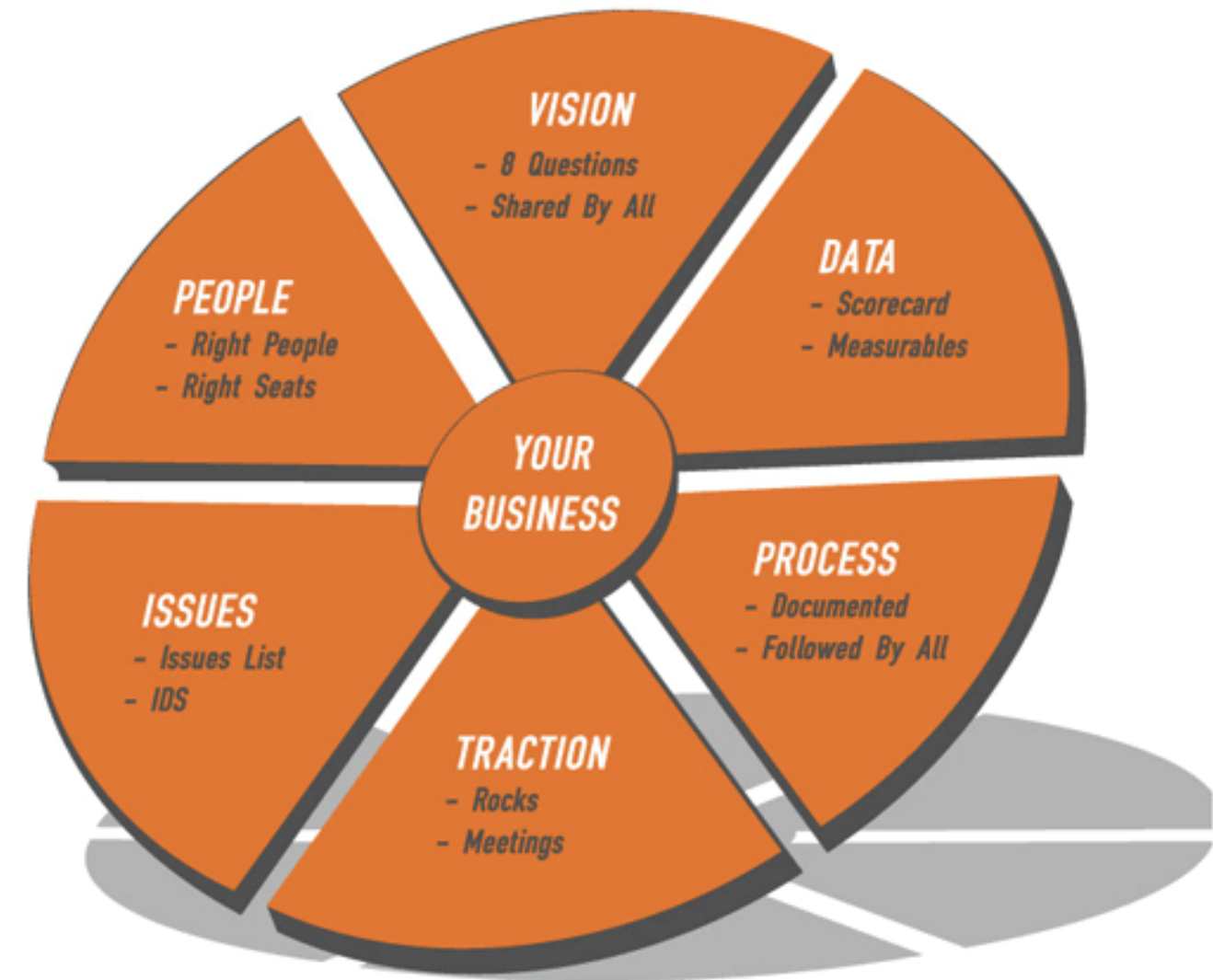
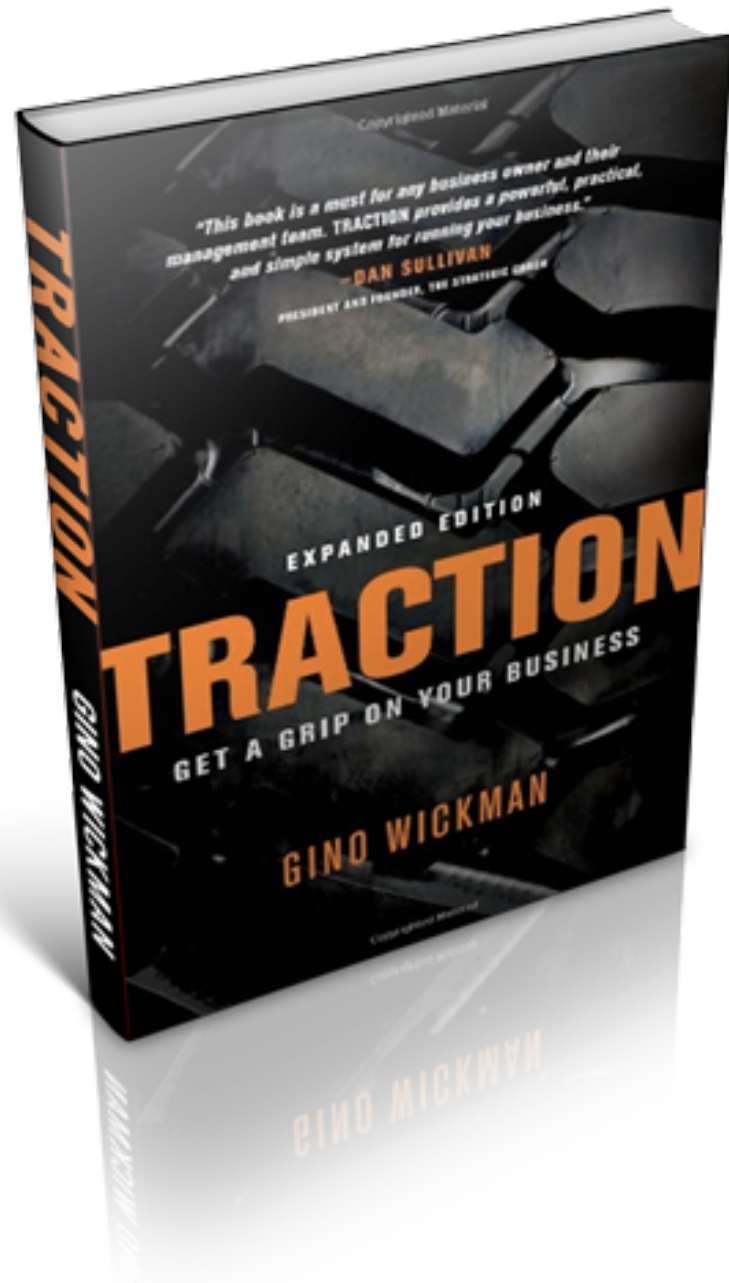
Relationships - All company members maintain close, personal ties with fellow employees, customers and suppliers.

Culture - The Company encourages a friendly and collaborative culture, based on caring for people in the totality of their lives.

Passion - All Company leaders have a burning passion for what the company does.

Profit - The Company has a sound business model, a healthy balance sheet, and a steady gross margin which it protects.

The Inspiration: Entrepreneurial Operating System®



The Inspiration: IEP Method[®]



The A-Ha Moment

The A-ha Moment



Are you letting your life
and work “happen” to you?

Are you ready to **let go**
and accept help?

The Journey

Does everyone share
your **vision**?

Shared Vision of Success



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: The Whole Brain Group

CORE VALUES	<ol style="list-style-type: none"> 1. We seek excellence in everything we do. 2. We value and nurture collaboration. 3. Our communication is honest and respectful. 4. Our service is enthusiastic and engaged. 5. We are driven to learn and improve. 	3-YEAR PICTURE™
CORE FOCUS™	<p>Proposed/Current/Future: Helping small businesses grow and achieve their vision.</p> <p>Our Model: Supporting growing companies with scalable marketing and sales solutions.</p>	<p>Future Date: December 31, 2017</p> <p>Revenue: 20% Net Profit 20%, Gross Profit 50%</p> <p>Headquarters: \$500,000 (2017)</p> <p>What does it look like?</p> <ul style="list-style-type: none"> • Larger team, extensive light personal touch • Community outreach programs • Positive culture for leaders, health and wellness • Virtual self service system • Franchise by our clients to sell • Positive internal and external image and brand reputation • Measurable client results with strong ROI • Client success commitment to measure impact • Expanded services to support client growth • Established affiliate network • Strongest market partner • Increased platform for thought leadership
CORE TARGET	<p>Future Date: December 31, 2017</p> <p>The Whole Brain Group is recognized as a world class inbound marketing agency with a highly engaged team, delighted customers, and deep roots in our community.</p>	
MARKETING STRATEGY	<p>Target Market: "The Lead" - Growing companies with revenues of \$500 - \$10M who want to follow a proven marketing process and have a clear vision for building a great company.</p> <p>Key Objectives:</p> <ol style="list-style-type: none"> 1. Connecting sales and marketing with a results driven strategic process 2. Strengthening relationships with long term customers who view us as part of their team 3. Connecting entrepreneurs to resources and best practices for how they achieve growth strategies <p>Process Process: The Whole Brain Way</p> <p>Commitment: To design our clients with our services, care for and protect their interests, and deliver measurable results with our proven process.</p> <div data-bbox="2059 1125 2548 1369"> </div>	

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Q2 2015 - Last Updated: 4/26/2015

Shared **Core Values**

- We seek **excellence** in everything we do
- We crave and nurture **collaboration**
- Our communication is **honest and respectful**
- Our service is **enthusiastic and engaged**
- We are driven to **learn and improve**

Shared **Long-Term Vision**

To be recognized as a world-class inbound marketing agency with a highly-engaged team, delighted customers, and deep roots in our community.

Shared **Passion**

We are passionate about helping small businesses achieve their visions.

Shared Definition of our **Ideal Client**

Ideal Client Profile | The Whole Brain Group, LLC



the whole brain group

The Whole Brain Group

Our team is committed to helping growing businesses develop and execute digital and inbound marketing plans that complement their strategic visions and provide measurable results. Our clients understand that it takes a wide range of skills to market effectively online, and that it doesn't make sense for most growing companies to hire, train, and support a large team of marketing experts in-house.

Instead, they've selected The Whole Brain Group to function as their virtual marketing department - providing digital and inbound strategy, web design, development, social media, content, and pay per click expertise with a strong focus on delivering measurable results.

Our favorite clients view us as a partner in their growth, because we are passionate about taking an integrated approach to helping them achieve their business goals, and we strive to combine the logical & tactical (Left Brain) with the creative (Right Brain) to achieve Whole Brain Goodness!

We engage with...

Owners/CEOs & Marketing Directors of growing companies to help optimize their marketing activities and maximize the use of their marketing budget.

These leaders are...

- Growth oriented
- Decisive, with a clear vision for their company
- Committed to a regular strategic planning process
- People who want to generate leads online and track those leads using a CRM like Salesforce
- People who know that an investment in their online presence will pay off in future sales and opportunities
- Offer a best-in-class product or service with premium pricing
- Planning to spend 3-5% of top-line revenue on marketing

Typical clients have 30-400 employees, and \$3M to \$35 Million in annual sales.

Clients engage us when they...

- Want to develop/execute a complicated marketing strategy that leverages inbound and digital marketing methods, but they don't want or can't afford to hire an internal team of specialists.
- Want to educate their prospects before they talk to them
- Need a way to provide examples of their work online
- Need a way to generate and track leads via their website
- Want to generate enough leads and sales to support their growth goals
- Want to start blogging or engaging on social media, but don't have the time or desire to develop all of the content themselves
- Need a new or refreshed brand/logo or website
- Want a professional online presence with the ability to scale

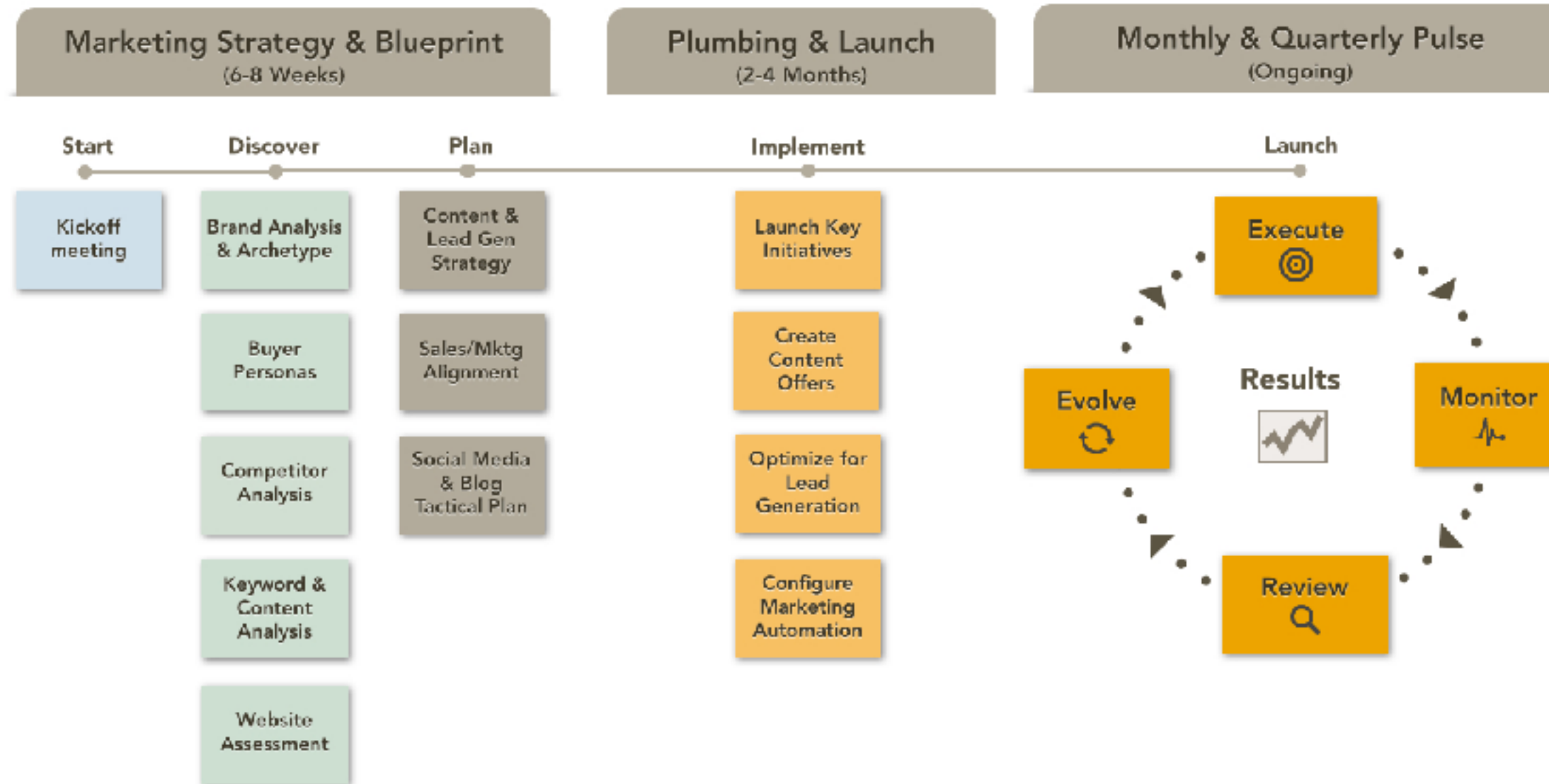
Our ideal client is looking for...

- Customers who are willing to pay a premium for their product or service
- Like-minded customers & partners they enjoy working with
- A shorter sales cycle and more qualified prospects
- A marketing strategy and execution plan that will differentiate their business from other competitors
- A strategic marketing partner who will help them develop a long term vision for success
- Alignment of sales and marketing priorities and activities

Our ideal client values...

- Customer service and thoughtfulness
- Time savings and efficiency
- High quality and beautiful design
- Data and metrics
- Work-life balance
- Company culture & employee satisfaction

Shared Proven Process

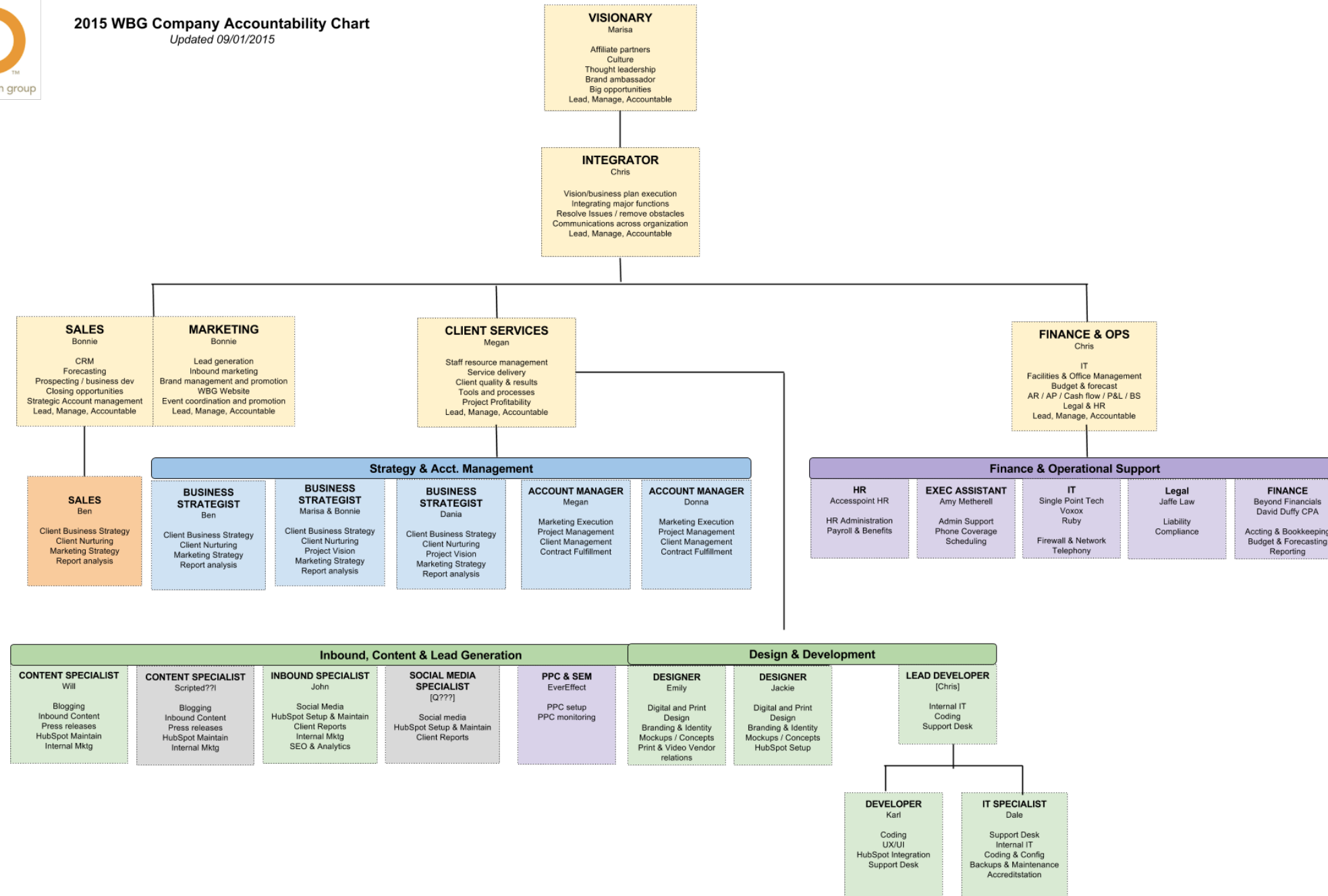


Do you have the
right people on your
team?

Clear Accountability, Roles, and Responsibilities



2015 WBG Company Accountability Chart
Updated 09/01/2015



Put the **Right People** in the **Right Seats**

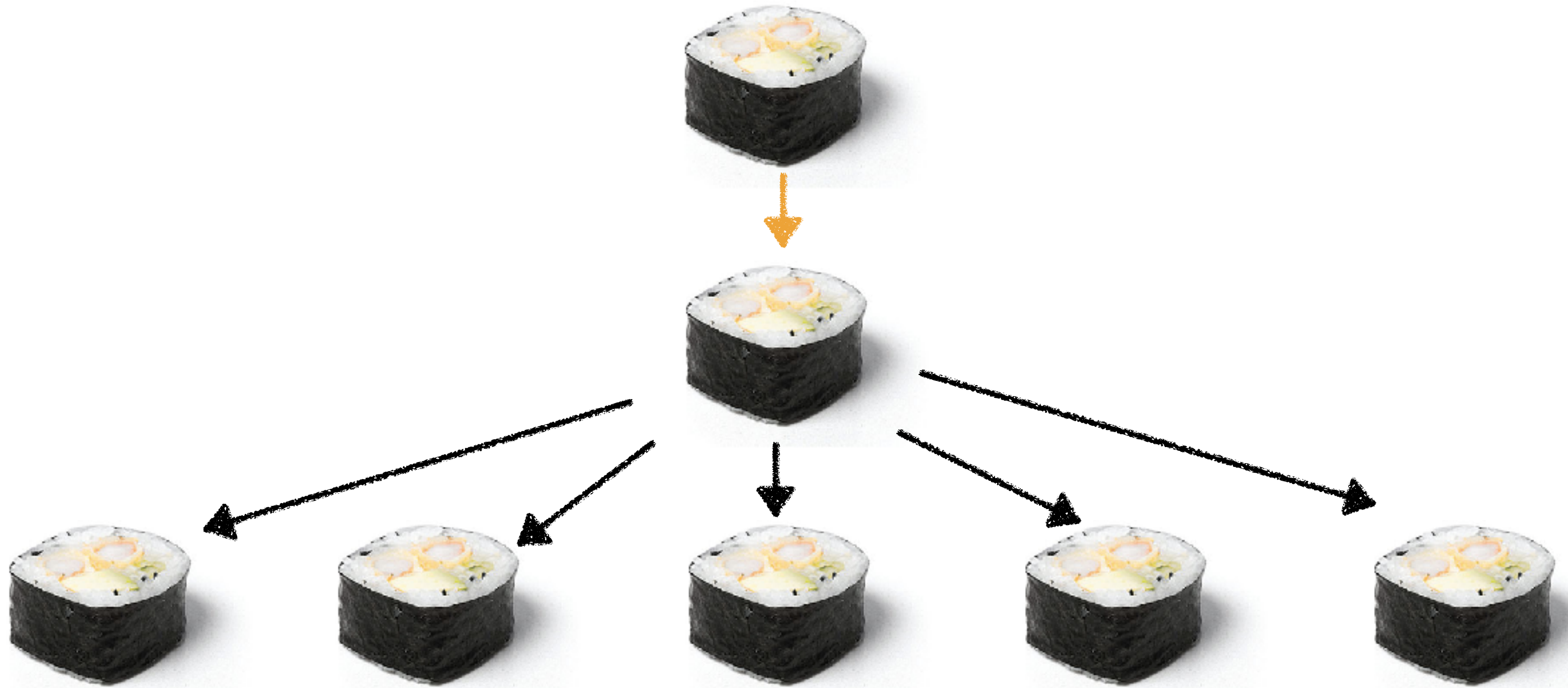
THE PEOPLE ANALYZER™

NAME	<i>Positive</i>	<i>Organized</i>	<i>Driven</i>	<i>Coffee Lover</i>	<i>Gets It</i>	<i>Wants It</i>	<i>Capacity to do it</i>
Chandler	+/-	-	-	+	Y	Y	N
Joey							
Rachel							
Monica							
Ross							

Rating: + +/- -

Are you in the **right seat**?

Another A-ha Moment



Get in the **Right Seat**

Visionary	Integrator
Big picture External relationships Creative problem solver Innovation Connect the dots Pulse on the industry & target market	Clarity & Communication Repetition is ok Holding people accountable Remove obstacles & barriers Steady force/consistency Integrates the leadership team
Inconsistency Short attention span Organizational "whiplash" Reluctance to let go Resistance to following process Foot on the gas pedal	Thankless job Accusations of pessimism Bad guy Lack of recognition Says "no" a lot Being accused of moving too slowly

Are you **focused** on the
right stuff?

Clear Priorities + **Compartmentalization**

1 Year

90 Days

Parking Lot

Clear Priorities + **Compartmentalization**

ORGANIZATION NAME: The Whole Brain Group

1-YEAR PLAN	ROCKS	ISSUES LIST - Parking Lot																																
<p>Follow Date: December 31, 2015 Revenue: \$1.2 Million Net Profit: 25% Gross Profit: 45% Full-time Manager: 100 (11 FTE)</p> <p>Goals for the Year:</p> <table border="1"> <tr><td>1. Refine Product Portfolio</td></tr> <tr><td>2. Rewards and recognition systems rolled out</td></tr> <tr><td>3. Core accounts implemented to demonstrate return on investment (ROI)</td></tr> <tr><td>4. CRM foundation work fully implemented (Lead, Deal, MQL, Forecast, Pipeline, Meeting Point)</td></tr> <tr><td>5. Revenue analysis service gap</td></tr> <tr><td>6.</td></tr> <tr><td>7.</td></tr> <tr><td>8.</td></tr> </table> <p>With your cursor in the last row, press Tab to add another row</p>	1. Refine Product Portfolio	2. Rewards and recognition systems rolled out	3. Core accounts implemented to demonstrate return on investment (ROI)	4. CRM foundation work fully implemented (Lead, Deal, MQL, Forecast, Pipeline, Meeting Point)	5. Revenue analysis service gap	6.	7.	8.	<p>Follow Date: July 31, 2015 Revenue: \$250,000 Net Profit: 25% (62,500) Gross Profit: 45% Full-time Manager: 100 (11 FTE) Resources are measured at 100 - 400</p> <p>Rocks for the Quarter: Q2 2015</p> <table border="1"> <tr> <td>New Service Account Executive</td> <td>Barrie</td> </tr> <tr> <td>Develop 1 year rolling and expense plan including capex plan</td> <td>Chris</td> </tr> <tr> <td>Rewards program approved by Leadership Team and rolled out to team</td> <td>Chris</td> </tr> <tr> <td>Customer case complexity defined and reduced to 50</td> <td>Megar</td> </tr> </table> <p>With your cursor in the last row, press Tab to add another row.</p>	New Service Account Executive	Barrie	Develop 1 year rolling and expense plan including capex plan	Chris	Rewards program approved by Leadership Team and rolled out to team	Chris	Customer case complexity defined and reduced to 50	Megar	<table border="1"> <tr><td>File of Business: Internal website, other</td></tr> <tr><td>File of Accountabilities</td></tr> <tr><td>Revenue generation plan to identify</td></tr> <tr><td>Customer success: contribute plan</td></tr> <tr><td>CRM Tools: meeting with others to use as a 1st agenda item/initial focus</td></tr> <tr><td>Revenue plan description</td></tr> <tr><td>CRM software: Lead Management, Forecasting</td></tr> <tr><td>New Product Demo</td></tr> <tr><td>Case Study Report</td></tr> <tr><td>Development for client needs</td></tr> <tr><td>Revenue process for retention</td></tr> <tr><td>Customer value of customer</td></tr> <tr><td>Service differentiation</td></tr> <tr><td>Marketing as Line of Business</td></tr> <tr><td>Coaching as Line of Business</td></tr> <tr><td>White Paper Treatment</td></tr> </table> <p>With your cursor in the last row, press Tab to add another row.</p>	File of Business: Internal website, other	File of Accountabilities	Revenue generation plan to identify	Customer success: contribute plan	CRM Tools: meeting with others to use as a 1st agenda item/initial focus	Revenue plan description	CRM software: Lead Management, Forecasting	New Product Demo	Case Study Report	Development for client needs	Revenue process for retention	Customer value of customer	Service differentiation	Marketing as Line of Business	Coaching as Line of Business	White Paper Treatment
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Q2 2015 - Last Updated: 4/23/2015

Is everyone on your team
showing up for
success?

Clear Communication: Agreements

- Time integrity
- Maintain accountability
- Respect the agenda
- Assume Good
- Be Prepared
- Be Present
- No Sidebars
- Essential devices only
- No food **
- Active participation
- Solutions-minded
- Be mindful of energy and impact
- Minimize distractions
- Direct engagement
- No Drama or Gossip

Do you have a culture of
discussing? or **solving**?

Clear **Communication** + Effective Meetings



THE LEVEL 10 MEETING™

The Weekly Agenda

Day: _____ Time: _____

Agenda:

Segue	5 Minutes
Scorecard	5 Minutes
Rock Review	5 Minutes
Customer/Employee Headlines	5 Minutes
To-Do List <small>.....</small> <small>.....</small> <small>.....</small>	5 Minutes
IDS <small>.....</small> <small>.....</small> <small>.....</small>	60 Minutes
Conclude Recap To-Do List Cascading messages Rating (1-10)	5 Minutes

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Are you getting the
results you want?

Financial Transparency + Data

Weekly all-staff review of:

- Accounts Receivable
- Cash on hand
- Income projection
- COGS + Expense projection
- Net Profit projection
- Access to P&L/Balance Sheet

COMPANY SCORECARD

WHO	MEASURABLES	GOAL	5-Jan	12-Jan	18-Jan	25-Jan	2-Feb	9-Feb	16-Feb	23-Feb	1-Mar	8-Mar	15-Mar	22-Mar	29-Mar

The Results: Stronger **Bottom Line**

- 20 - 40% Revenue Growth Per Year
- Revenue has more than doubled since 2012
- 0% Retainer Revenue in 2012 vs. 75% in 2016
- Gross Profit now averages 35 - 40%
- Average Salaries are 20% higher

The Results: Attracting **Great Clients + Partners**



The Results: Hiring + Retaining **Great Talent**





Don't take it all on by
yourself.

Ask for help.

Don't be a victim of your work.

Be intentional.

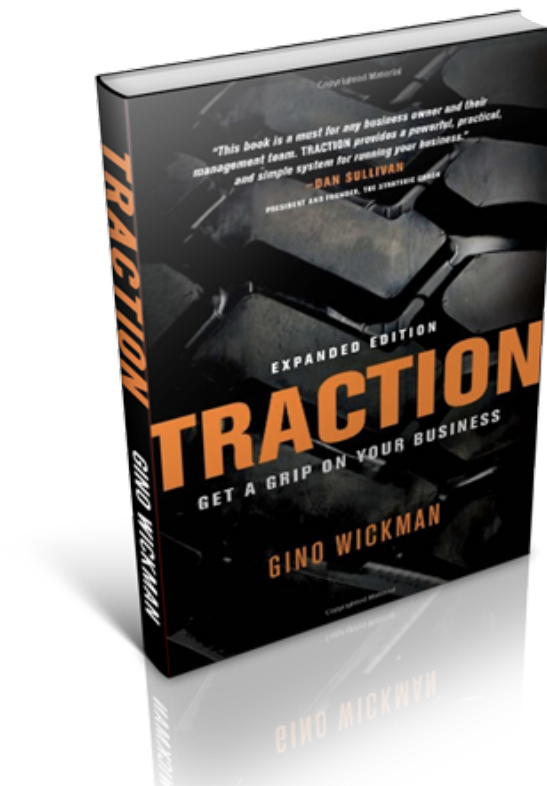
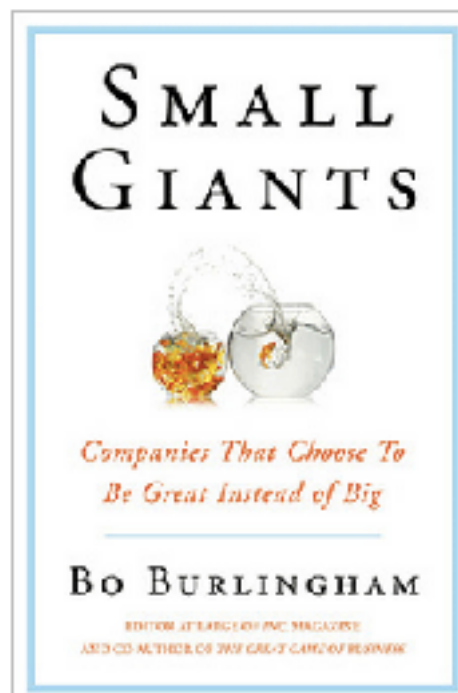
Don't try to fix everything
at once.

Be disciplined.

The Resources

The Resources

- Small Giants Community - <http://www.smallgiants.org>
- Download free EOS Tools - <http://www.eosworldwide.com/eos-toolbox>
- The IEP Method® - <http://www.anesecavanaugh.com>



Thank You

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