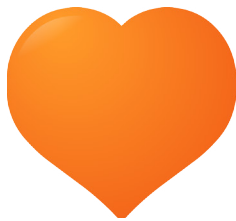


THE EMPOWERED AGENCY



5 STEPS TO BECOMING A SUCCESSFUL INBOUND MARKETING AGENCY FROM THE PEOPLE WHO'VE DONE IT.



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Publish content to your social accounts, then nurture leads based on their social engagement.



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Produced By: Matthew Wainwright

Matthew is a Principal on HubSpot's Channel Marketing Team. He works to nurture and qualify new agency leads for the sales team, manages the Partner Tiers and Awards Program, and creates content to help existing Partners grow their business. He also tackles many analytical projects for the team.

Matthew originally came to HubSpot as an Inbound Marketing Consultant with digital agency experience and an MBA in marketing. Prior to that he worked in the sales and brokerage of logistical services.



Introduction

There are over 50,000 agencies in North America today – that’s a lot of people competing to get at one piece of the same pie. To make the competition even tighter, we’re seeing more agencies embrace inbound marketing – both as a service, as well as for their own agency. So what differentiates the skyrocketing inbound agencies from ... the rest?

At INBOUND 2013, I had the privilege of talking with several of HubSpot’s most empowered agency partners with the goal of figuring out some of the keys to their success, outside of inbound marketing adoption. After several conversations, one element consistently stood out as a differentiator for success: adoption of an inbound sales methodology.

What follows is a consolidation of the advice these successful agency partners shared with me about their sales methodology. It covers getting started with sales, building a solid sales pipeline, sales qualification, profitability, as well as an attempt at making some of the intangibles in Sales – grit, persistence, and the like – a bit more tangible.

1

GETTING IT STARTED

Some agencies are excited to take an inbound approach to their sales and marketing, but they realize that it takes time to see sustainable results – and frankly, the bills can't wait. You'll need to learn to balance short-term wins with building a scalable, sustainable approach to inbound marketing and sales.



Offer Free Engagements in Exchange for Referrals

I would go to the first client and give them a free engagement. One, you get your bugs out. Two, say “I will do a free engagement with you, but I need you to refer me to five of your friends.” And that’s the trade-off. They get a wonderful experience with your marketing expertise, and you get five of their buddies. Close one or two of those deals, parlay those testimonials into more, and before you know it, you have a group of people who can refer you.

The inbound marketing you start on day one really won’t start to get traction for a couple of months as you create content and get it out there, but maybe you’ll get one lead the first month, two leads the second month, five leads the third, but before you know it, you’ll have a nice, balanced portfolio.

Eric Keiles, Square 2 Marketing



Create a Financial Safety Net

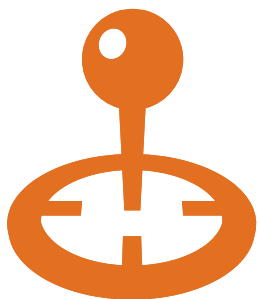
Any way you can (legally), create a financial safety net. Get a group of like-minded business partners together to help fund you. A group of friends, even family. That way you'll have the courage to say "no." That way you won't take any kind of work just to feed your family.

That's what I did. I created my financial safety net by scaling down. I used to live in New York, now I live in North Carolina. I no longer have any houses or mortgages. I sold my homes and paid off my mortgages."

I did all of that because I wanted to start this new business and grow it on my terms. I've been on the verge of bankruptcy with a \$10 million company I'd built from the ground up. I've also been on the verge of personal bankruptcy. But I've always been able to turn it around.

If you've been to the edge, seen what's at the edge, and know you're always going to come back from it, then you're not afraid to say "no." We weren't afraid to let go of four clients at once. We know the right thing to do is to say "no" to clients and engagements that aren't the right fit for us.

Rick Kranz, OverGo Studio



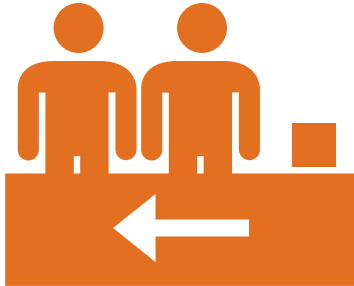
Know Where You Want to Go and How You Will Get There

Work on understanding what the client's problem is, what they've done, how they're set up to solve it, and then make sure they understand what you offer. Go through that logical progression until you feel really comfortable that you're a good fit for them, if not the best fit. And then that should give you a sense of confidence.

One more fundamental thing that you have to do as a start-up agency or new agency — know what you're good at, what you want to do, how you want to deliver it, where you want to be in five years. You've got to think about those things and really be confident that that's where you're going.

You've got to know your people, your strengths, and your value. If you don't, you can't convey that to somebody else. The agencies fumbling around and trying to find themselves, that comes across in a phone call, on a website, and their email making it very confusing to a prospect. That uncertainty can, and will, hinder your ability to grow your business.

John McTigue, Kuno Creative



Create a Natural Way for the Agency-Client Relationship to Evolve

We hate writing proposals. We aim to have someone say “OK, let’s get started” on a handshake (real or virtual). But every handshake has a contract that outlines everything we’ve talked about. Much of the time we can get that buy-in before they walk out the door.

We use web development as a starting point since that’s been our focus. And we build into our contracts the option to add on a retainer for inbound marketing consulting and services. So from the get-go, they experience the value of working with us and have a clearly laid out path they can slip into easily. It creates the conditions for a natural way for our relationship to evolve. I think that’s partly why we’ve been doing as well as we are.

Remington Begg, Impulse Creative



Know Your Value

We feel as though so many people need what we know how to do. We're always looking for the next opportunity that's the best client we've ever had. We've got people standing in line waiting to work with us because we've been able to prove our success. I feel that even if you're in a desperate situation and you make concessions, you've still got a huge opportunity cost. Whenever you make concessions, you're putting yourself in a bad situation.

The bottom line is this: if you've got a product and service that's valuable, be confident. Know your value and don't compromise it. Whenever people can sense that even you don't believe in your own value, they wonder why they should buy from you.

Rachel Cogar, Puma Creative

2

BUILDING UP THE PIPELINE

While you may have to do whatever it takes to keep the lights on, tomorrow's empowered agency has already put its inbound marketing machine in place and is generating leads while they sleep. How many leads? How does "way more than yesterday" sound?



Find Ways to Make Your Pipeline Rich

A good friend of mine says “When you have a lame pipeline, you act like a lamb, and when you have a full pipeline, you act like a lion.” Through inbound marketing and using HubSpot, we have a very, very rich pipeline of clients.

When you’ve got a rich pipeline, if clients aren’t a good fit or don’t appreciate what you’re bringing to the table or don’t agree with your methodology, it’s easy to say, “Thanks, but no thanks” because you’ve got three teed up right behind them that are interested in talking. If we had a weak pipeline, we’d be in a different posture, but for the last five years now, we’ve had more leads than we can handle.

I do a lot of public speaking. Once a week I’m on the road talking to a group of business owners or marketers. Back then that counted for 40% of our leads. But now 40% of our leads come from inbound and 20% come from referrals.

Now our pipeline is a lot more robust, and conversions are great. We’re converting 20 to 30 people a day on our website and that accounts for about three to five direct sales leads, which is enough for a small firm like ours to keep very busy.

Eric Keiles, Square2 Marketing



Nail Down Who Exactly Is In Your Pipeline

One of the first positions we hired at our company was someone to be responsible for our marketing. We had to become experts on HubSpot, but we also needed someone who was going to build up our own sales pipeline of opportunities. And he's done a great job. Such a great job, that one of the questions that became really urgent for us is — we're getting 1,200 leads per month, who are all these people?

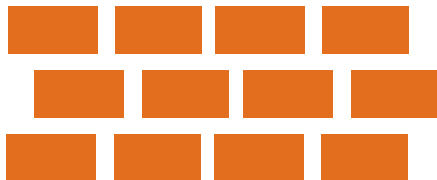
And we didn't know. And that was one thing I pushed back onto my team. Who are all these people? We're touching maybe 20 to 30 of them, but who are the rest? So we began segmenting them. These are agencies, these are out of the country, these are probably not a good fit for us, so let's block all of these out. That left us with 300 or 400 people to heavily focus on. (We get a lot of agencies that download our content.)

Now I have somebody on staff who is going through and doing more of what we call social lead nurturing, very personalized lead nurturing. So qualifying them and organizing our sales force to make sure we know who these people are and sending very personalized marketing messages to them. We find it's working really well for us.

I also remember that Chris Knipper over at Kuno gave me some great advice when I first got started. At the time, I couldn't understand why all of these agencies were helping each other out. But he made it very clear to me. He said, "If all HubSpot Partners pooled our resources together, we couldn't even cover 1% of the market."

And that's the attitude I take when I'm talking to a client. I now think, "OK, if this client's not a good fit for Impact, let it go — our pipeline's full." In fact, your pipeline is always full, whether or not you're generating enough leads with your own marketing. The work is out there. You just have to go get it.

Bob Ruffolo, Impact Branding and Design



Hitting the Bricks, Inbound Style

The most underutilized means for generating leads immediately for an agency is public speaking. There's nothing even close to it. And every city has multiple groups of business professionals that meet regularly and are dying for good speakers, for new ideas, to hear the latest and greatest.



And it's almost impossible, assuming your message doesn't suck, not to get leads immediately from those opportunities. Those leads are way better too, because the person is focused and ready to learn at that particular meeting. I think that's one thing most agencies don't do. A lot of them do many good "inbound" activities initially regarding their website, but this can be slower to produce leads quickly. Public speaking, on the other hand, can get immediate results. And when we are just getting going, this is critical in terms of generating cashflow and success.

Having said all that, I also only want to work with about 20% of the people that contact me. If it ever goes above 20%, that means I'm working with people who are underachievers. And I only want to work with overachievers.

Now, two years ago when I started doing this, like anybody else I didn't have any leverage. So I worked with whomever I could. Then I realized I wanted to work only with world champions.

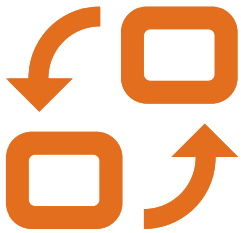
World champions get the most fruit out of inbound marketing. They become the most profitable. Which means I'll make the most money because they'll be making the most money. Everybody's happy. And everybody's willing to do what it takes to really be an outlier.

Marcus Sheridan, The Sales Lion

3

QUALIFYING YOUR PIPELINE

You know the saying, “beggars can’t be choosers”? At this point in its transformation, that won’t apply to you. The empowered inbound agency can pivot toward more aggressive lead qualification.



Let Leads Self-Qualify

If you want to have a conversation with me, then you need to finish my ebook first. I get a number of people that contact me saying, “Hey, let’s have a conversation about such and such.” What they mean is, “I have this problem. I’d love to talk to you about it.”

And so I respond with, “Sorry you’ve got this problem. I’d love to talk to you as well. Have you read my ebook yet? If not, I want you to read the ebook. Then I want you to tell me what you think the solution to your problem is. And that’s when we’re going to have a conversation on the phone.”

It’s relatively impossible for somebody to read 250 plus pages of my ebook not be hanging out of the funnel at the bottom, ready to do business. They’re already there. I won’t work with you – heck, I won’t even have a conversation with you — unless you’ve done that.

And this means I have great conversations with educated people. I’m not pitching them. They’re pitching me. I think that’s the upside-down selling side of the way I do it. Because from the get-go, I have the leverage. I’m in charge. It’s more about I’m betting them versus them betting me. I’m seeing if they’re a good fit for me versus them seeing if I’m a good fit for them.

And that’s the beauty of assignment selling. They either push themselves all the way down or see themselves out of the funnel immediately.

Marcus Sheridan, The Sales Lion



Invest a Little More Time to Find a Much Better Fit

What we're really looking for is an ideal customer. So the whole sales process, even the inbound marketing process, is designed to get people together with us that are a good fit. It's actually a journey to find the right people that we want to work with.

And it takes a little longer that way. But our close rates are extremely high, because we've built up this thing. And the way we do our sales process, they're ready to buy from us when we ask for the deal.

The idea is you get across in the first five minutes why we should be working together, and why we would want to work with them. I do end a lot of qualification calls within five minutes. I'm very good at that, because I listen for the clues that they're not a good fit for us.

Our leads talk to one of the founders of the company, because we're often talking to an executive, someone high up, at least in our business.

We're a little more aware, as any partner would be, of what results customers want and what strategies they are willing to adopt and can actually execute on than you [HubSpot] do because you're a few steps removed.

John McTigue, Kuno Creative



Learn the Warning Signs

We try hard to be discerning about the clients with whom we do business, for their sake as well as ours.

I think defining the anatomy of a deal is important. Unless we establish quite early on that the prospect acknowledges that what they've been doing hasn't been working and they need to make a change, then they're unlikely to be a good fit.

Our fear is getting into a relationship that's not a good fit, which ultimately results in both of us have a damaging experience. So for us, we're more afraid of winning the wrong deal.

Because as a services company, if we get into the damaging deal that doesn't go right for them, and we can't add value, people will find out about it. And, in this day and age, people can let others know quite easily that they've had poor service. I'm far more frightened of damaging our brand.

Maybe I'm going to be controversial here. I don't fundamentally believe in the whole BASHO 14 times and you're done.

We take a much more combined approach, I think. We want some inbound evidence of genuine interest and fit. And at that point, the calls that we put in are designed to attract. And if that doesn't attract them, we don't pester.

I want people to take a step towards us. You get better leads and you have more food for conversation. If you have to hound them down, you're less likely to have a good outcome.

Johnny Mone, Brightfire



Look for Clients Who Share Your Worldview

We've stayed focused on delivering the expertise of an inbound strategy. We've also found that because we're so particular about the clients with whom we work and what we do for them, that we end up with clients who get it. Clients who share our worldview about the way marketing works today.

Consequently we end up with very successful clients.

We're creating success. We're creating money. We're creating work-life integration, because we're happy being the heroes. We enjoy being a very niche company. We find there's a waiting list of people who want to come work with us. And that's a good situation to be in. So we don't find ourselves resorting to selling whatever needs to be sold.

Rachel Cogar, Puma Creative



Use Lead Scoring to Get More Efficient

Some of the areas that I'm working on internally is prospecting and weeding out the people that maybe shouldn't be there. Because we are very busy. We're at a critical point of growth. We just need to figure out which leads have more value than others. Lead scoring, for instance, is something that I haven't done much of.

When we started, we didn't have too many leads in the beginning. We started off with: we need to worry about leads, we need to worry about content, we need to worry about moving forward. So now that we're starting to get more lead flow and more content, how do we quickly grade these leads in a better way? So lead scoring is something we've been working on to get more efficient because we're becoming so busy.

Remington Begg, Impulse Creative



Have a Plan for “No”

In the very beginning, as in any other startup I just wanted revenue. I didn't go through an inbound marketing assessment process. Which is now a critical component of our funnel at this point. Today we have a multi-step sales process. We understand our sales cycles. It's a bit easier for us because we dominate a specific vertical — transportation and the travel industry.

But as we branched out into real estate, health care and law firms, we really had to stick steadfast to that sales process you guys taught us. Because I can't fly by the seat of my pants in these industries. I lack the brand credibility and the authority.

You know what I fear? I fear the guy who says, “You know what, I'll get back to you.” And I keep following up, wasting my time. Tell me &^\$% yes or no, because that's all I'm looking for. Don't just drag me on in my process for three or four months. I don't fear rejection, because I've got a plan for somebody telling me no.

That's where a lot of people miss the boat. That lost opportunity shouldn't be kicked to the curb. Know the sales cycle. Know when they're going to be ready to purchase again, whether it's a year, two years, six months, whatever it is, and nurture the &^\$# out of them with valuable information.

Bill Faeth, Inbound Marketing Agents

4

PROFIT!

Repeatable services are scalable services – and it makes an agency’s book of clients more profitable. The empowered inbound agency keeps profit top of mind when making client onboarding and service choices.



Build a Repeatable Process

You have to build a process that's repeatable. For every business, it comes down to just one thing: a set of repeatable processes. Because whoever has the most efficient processes will make the most money. So if you're taking all these piecemeal projects, you're back to being a hunter and being very inefficient. In the end, it doesn't help grow your company.

At one point, we were A/B testing a portfolio of 14 customers, although we didn't realize that's what we were doing at the time. And while we were doing it, we saw that trying to do inbound — generate traffic and leads for clients that weren't on HubSpot — was just incredibly difficult. It took twice as much time, and we saw fewer results. In fact, the whole experience was so illuminating that I decided to blog about it.

These 14 customers were a nice mix of B2B and B2C companies, size, industries and personas. So I went back, pulled all the data, and analyzed it. I released a 3,000-word blog post showing the results for the seven on HubSpot, and the seven not on HubSpot. (The HubSpot sales people loved it. The post kind of went viral in the HubSpot community.) The data really showed the dramatic difference of using HubSpot versus not using it, even though we applied the same inbound services to both groups.

Each client got two blog posts a week, landing pages, ebooks, and videos. They were all comparable. Although it wasn't a true statistical test, the data showed a dramatic difference in traffic. Especially in how quickly traffic and leads increased. There was even a huge difference in HubSpot's effect on running pay-per-click ads, because we ran AdWords for our clients.

Bottom line: after we did this analysis, we made a conscious decision to eliminate any clients who weren't willing to get on HubSpot. We did it in a friendly, amicable way. We said, "Look, if you can't do this, get on this tool, and keep up with us, you're not ready for inbound marketing and we recommend you find another agency."

So, that's why we sell HubSpot. We get results. It makes our life easy, and it makes us look good, because we can now deliver what we promise to clients in a faster, less expensive way for them.

Rick Kranz, OverGo Studio



Use Data to Close Profitable Clients

HubSpot closes the loop on reporting. So instead of needing multiple systems to do different things, which takes up an awful lot of time, we have one platform that's able to do a majority of it. And we still use Google Analytics and a couple of other tools. But HubSpot addresses the majority of the need, which reduces a lot of the time and effort spent on accounts, which just makes us able to do more for our clients more efficiently.



After going through so many accounts and seeing what works for clients, and what doesn't work, it becomes quite apparent what needs to be done. And having those really frank conversations are much better to do up front rather than having to deal with them on the back end. Even if it means losing a deal.

Because it will cost you more in the long run. It'll cost you more not only in money but also in your energy. It'll take your energy from being able to build your company because you'll be so busy dealing with an unhappy client. Managing expectations is key to what we do.

Diona Kidd, Knowmad

5

PERSISTENCE

The most visible mark of an empowered agency is one that retains a distinct identity as it grows – but makes critical, sometimes painful, adjustments when necessary.



Work With Clients That Trust You

Many clients want you to do everything they need, and then act as though you've got unlimited hours for them. They want you to achieve their goals, but using their same old strategies instead of the strategies you recommended for them. And when the results they want don't materialize because you're doing their tactics, you're going to get fired.

So we learned the hard way. Now we work on screening those types of clients out. Instead we try to understand: How much does this client trust us? Will we be allowed to develop the best strategies for them and implement the ones we recommend?

Today we tell our clients, "No, we're not going to do this tactic. It's not going to achieve the overall goal of the campaign. Or, we can do it for you, but it's going to be additional." We try to figure that out as early in the agreement as possible and set the expectation moving forward.

If I were to do it all over again, I would do some things differently. We learned the hard way. We took on some tough clients and had some messy break-ups with them. And that's what I'm trying to help other agencies avoid.

Seth Godin, I think said it best. "If you're not willing to take a chance, you're playing it safe, it's failing." So you have to be willing to take risks, and you might fail. And that's OK.

Don't get stuck on an account that's not right for you. Move on to the ones that are. And with that kind of attitude, you overcome the fear.

One of the biggest takeaways for me from the advanced sales training series was that there's no replacement for activity. Scale and process will all come later, but you've got to be active. You've got to be from a sales standpoint, from a marketing standpoint, from an execution standpoint and managing your accounts. Everything is experience. And the more you do, the quicker you get results.

Bob Ruffolo, Impact Branding and Design



Specialize and Streamline

I think a main component to profitability and success is focusing on what your core is. Don't do too many things.

At one time, we had five different verticals we were focusing on. We pared that back to two. And that's really helping us grow agilely so we don't make bad decisions and try to be all things to all people.

Something that we also did, coming out of the corporate world into this inbound marketing agency, we had SOPs [standard operation procedures], strategies, procedures, and daily checklists. We had our project management software. We had HubSpot. We had Salesforce.



We had all of this stuff in place. But it kind of hindered the creative process because it took time and we had to put it all together ourselves. So I think you guys [HubSpot] have done an unbelievable job for the partners, of putting the right processes and resources together. It makes a huge difference to many partners. And I think the partner communications —weekly webinars, newsletters and sales coaching calls are great.

But the bottom line is this: what markets will you work in, what services are you going to offer and which tools will you choose to use? And are you going to listen and follow the map? Because if you listen, you'll be successful. If you don't listen, then you're going to potentially spin your wheels for the first few months, just as I did.

I think using 80% to 90% of HubSpot's advanced sales process has helped us, because our pipeline is so filled now. I think the easy part comes next, and that's filling the backchannel delivering services. Because I've learned that you've got to grow agilely. We can't bring on 18 customers a month. I've got 11 employees, my partner, and myself. At one time, we were up to 15 or 16. And we've been down to eight. It comes back to balancing revenue with delivery and that's a skill you have to learn.

Bill Faeth, Inbound Marketing Agents

CONCLUSION

Ready to transform your agency into an Empowered Agency like the ones present here? You don't have to do it alone! Check out these resources available to any marketing agency...

- [Request a Strategic Agency Consultation](#) and determine whether Inbound is the right direction for your Agency
- Check out these [additional Agency Resources](#) at the HubSpot Library
- Beef up your sales skills by checking out the [all new Inbound Sales Blog](#)
- Get more agency thought leadership from the [Inbound Insiders Blog](#) (hint: articles are written by our agency partners!)

Already an Agency Partner? These resources are just for you...

- [Get Partner Certified](#)
- Join the [HubSpot Partners Forum](#) on LinkedIn
- Schedule a call with your Partner Strategist

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