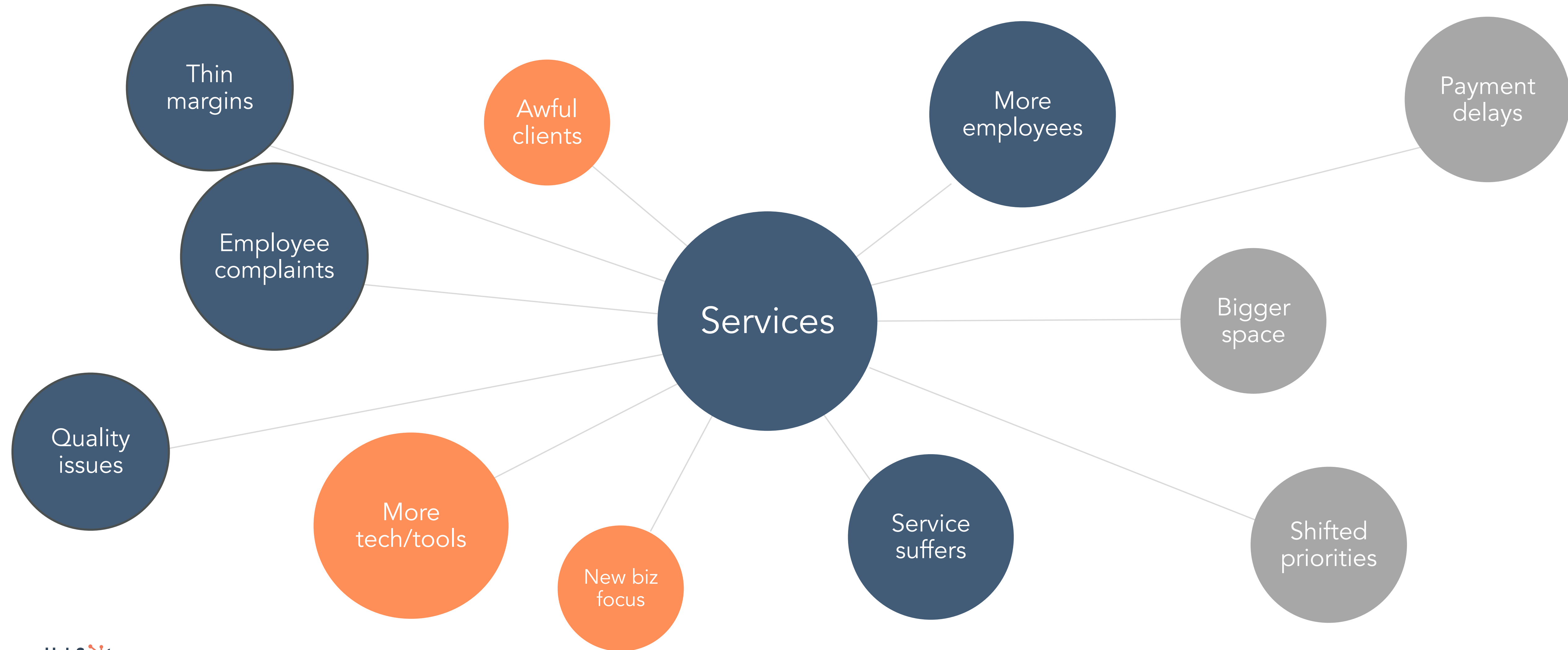




Scaling a Service Business Through Client Memberships, Community, and Transparency

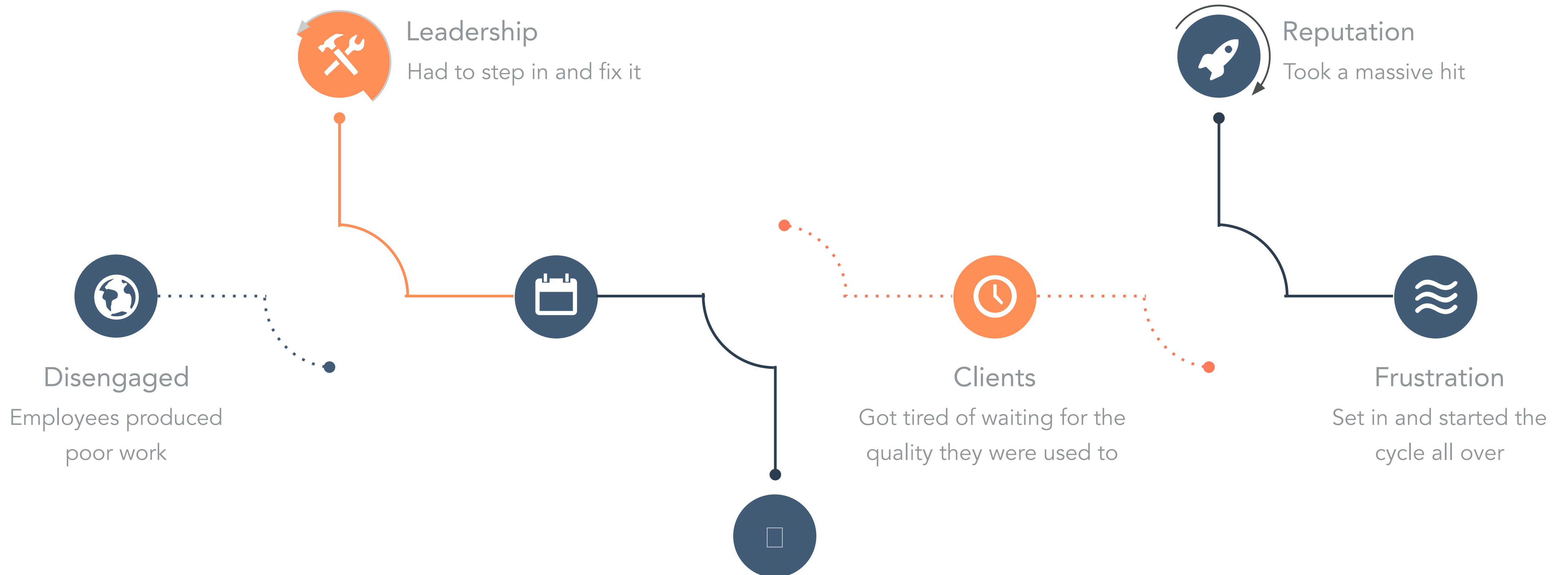
Scaling Issues

What was good, gets bad FAST



The Problem with This

What was good, gets bad FAST

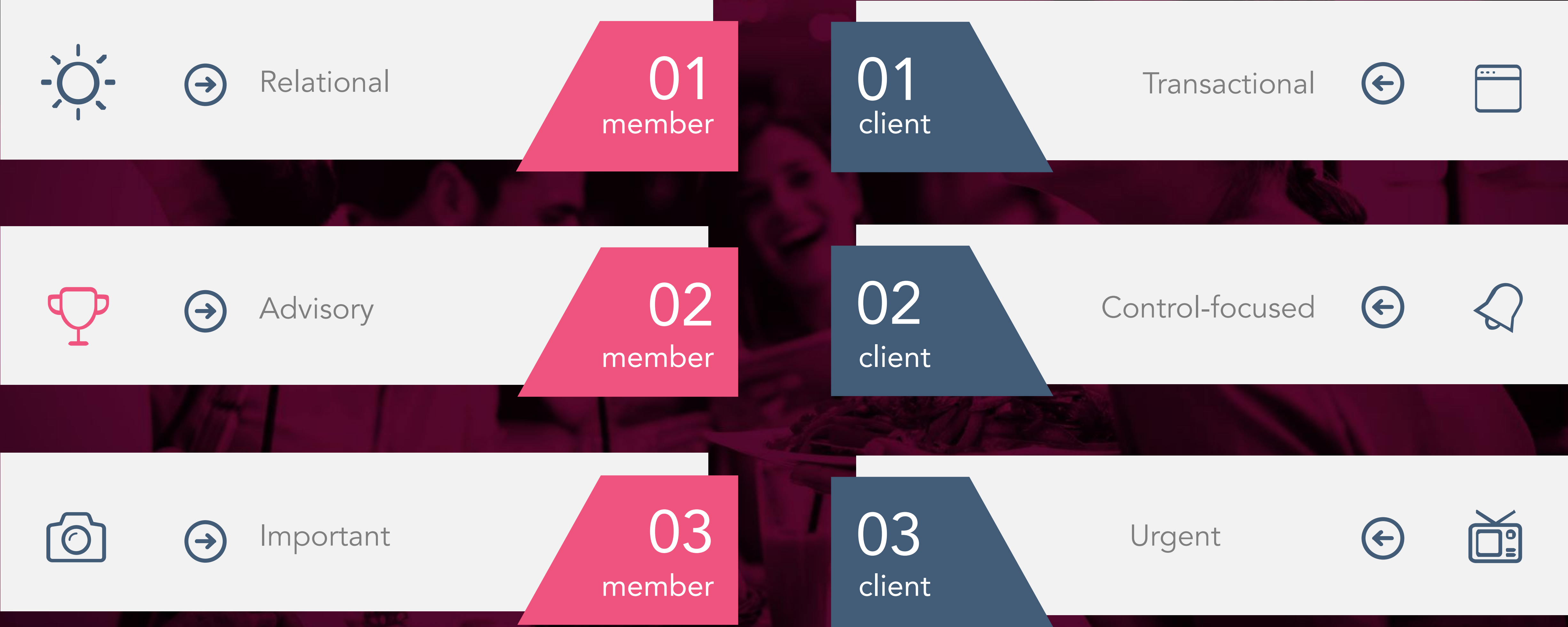




Memberships

What's the difference between
a client and a member?

Members vs Client



A man with a beard is shown from the chest up, wearing a checkered shirt, and is writing on a notepad with a pen. The image has a green overlay. On the left side, there is a vertical line with four circles of varying sizes (two small, one medium, one large) and a larger circle with a dot inside. The text 'Application' is written in a large, white, serif font, and 'Baking it into the process' is written in a smaller, white, sans-serif font below it.

Application

Baking it into the process

What does application mean?

01



Personal

Meet their needs as they are TODAY, but build solutions for tomorrow.

02



Relevant

If your solution just makes transactions easier, it's the wrong one. Partnership is the key.

03



Valuable

Your clients have no reason to switch, unless you give them one. What is valuable to them?

04



Upselling

There will always be a "next level"

Build It

- ◆ Average the hours and activities
- ◆ Determine the best ones for each client
- ◆ Create a membership level document (take the time)

01



02

- ◆ Speak to your team and help them understand they're moving from transactional
 - ◆ Create a video or training course, this doesn't happen overnight
 - ◆ Begin the process of writing about the transition. Start with the benefits.

- ◆ Create a comms strategy that works for employees, partners and clients
- ◆ Build out a reminder system and create an underlying support system internally
- ◆ Announce via phone, then email, then in-depth meeting/phone call.

03



04

- ◆ Reinforce. Again, it doesn't happen overnight. Your clients and employees will be freaked out.
- ◆ When they focus again on transactional, help them realign priorities.



Components

Make sure your prepared

It's Harder than it LOOKS



Commitment
to the Process



Regular Comms



Insights-Based Results



Clear Instructions



Energy to Keep Focused



Transparency into
Hours and Activities



Technology to Enable



FAQs



Time and Expectation
Management



More Money Honey

A Jeep Wrangler is shown driving on a desert trail during sunset. The vehicle is angled upwards, kicking up dust. The background features rolling hills under a warm, orange sky. In the top left corner, there are two decorative circular elements: a large semi-transparent circle and a smaller solid circle. In the top center, there are three concentric circles. The word "Loyalty" is written in a large, white, sans-serif font across the middle of the image, partially overlapping the Jeep's rear wheel and the desert landscape. The Jeep has "SEVEN PARK" written on its side.

Loyalty

Loyalty

Starts inside

We started by building engagement, pods, teams and investing in our values.



Inside Values



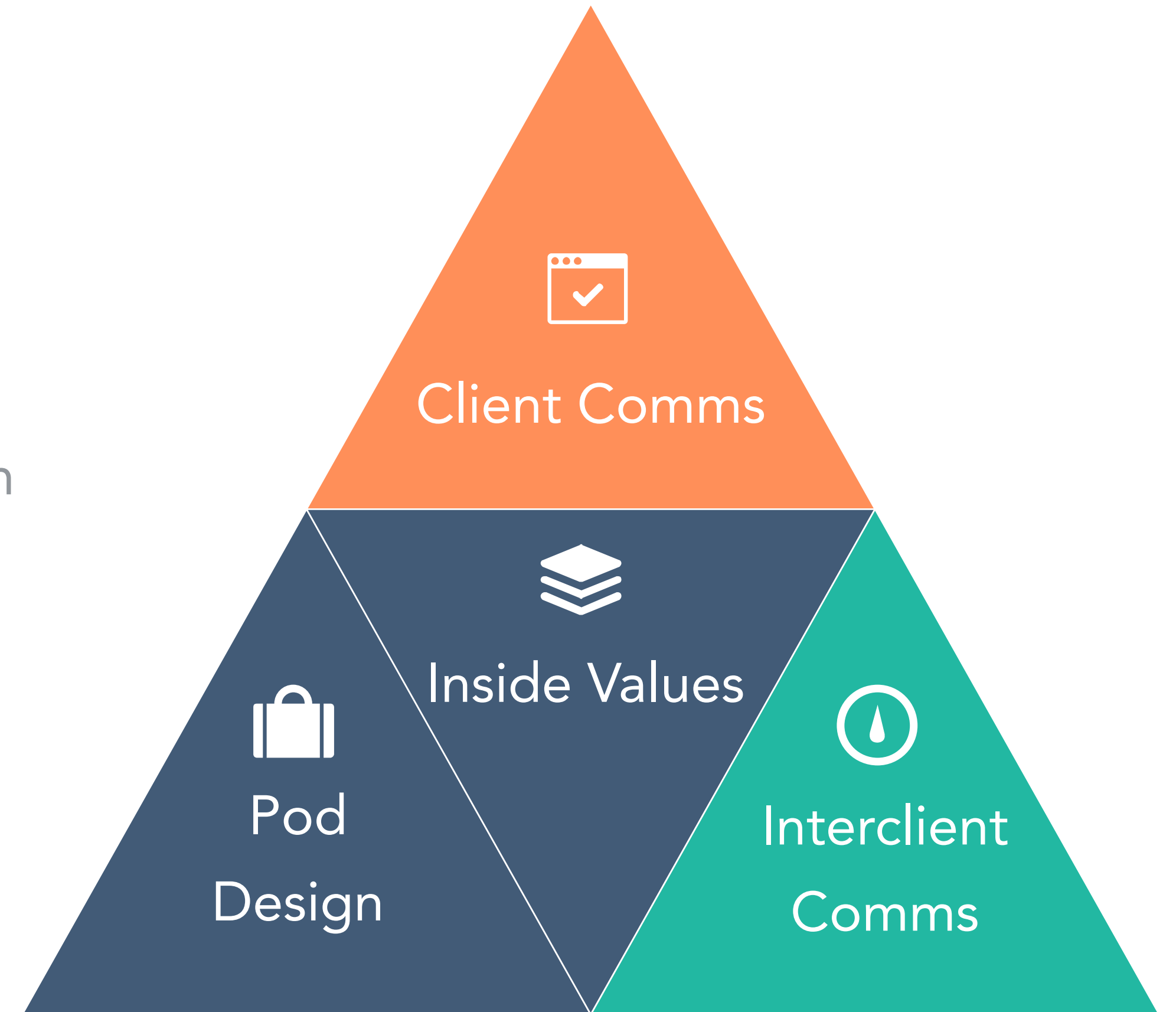
Client Communication



Pod Design



Interclient
Communication



A man and a woman are standing in a modern office, looking at a laptop. The woman is holding the laptop, and the man is pointing at the screen. They are both smiling. The office has large windows, modern furniture, and a warm, yellowish-orange color scheme. The word "Community" is written in white text across the middle of the image.

Community

Community



Consistency



Familiarity



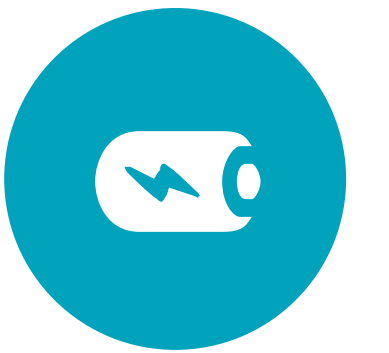
Celebrations



Identification



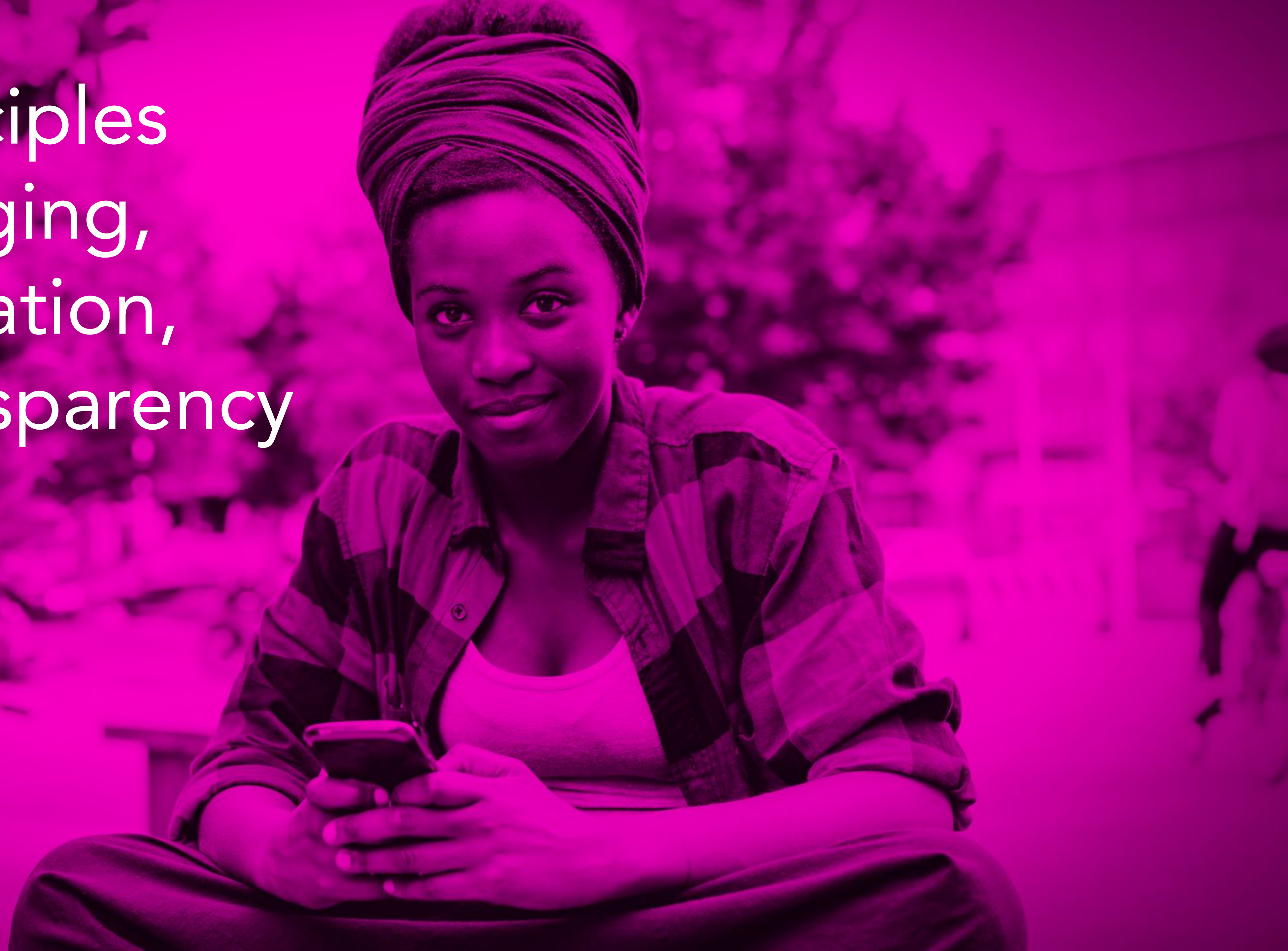
Energy



Meets the Needs



The Principles of Belonging, Collaboration, and Transparency





Belonging

Collaboration

A dimly lit office scene featuring a person's silhouette at a desk. The person is positioned on the right, facing left towards two computer monitors. A desk lamp is visible above the monitors. The background consists of a large window with a grid pattern, through which some greenery is visible. The overall mood is quiet and focused.

ChromeFileEditViewHistoryBookmarksPeopleWindowHelp

InboxRe: JaGOODSearchClient(1) moLATECScalinINBOUFacebJeep

https://redbranchmedia.monday.com/boards/233671435/

BookmarksTravelFinanceWorkBoysHealthBills

July 2019 Campaign Tasks

	Status	Type	Respon...	Due Date:	Time Tracking	Internal Link	F
Weekly Call 7/16 (Growth/SEO/Email)	Done	Strategy & Ops		Jul-16	40m 0s	July Call Notes	
Fix Buyer Personas in Hubspot	Done	Strategy & Ops		Jul-18	1h 30m 0s		
August Campaign Meeting	Done	Strategy & Ops		Jul-22	7h 20m 0s		
Weekly Call 7/23 (August Campaign)	Done	Strategy & Ops		Jul-23		July Call Notes	
Weekly Call 7/30 (Content/Social)	Done	Strategy & Ops		Jul-30	48m 0s	July Call Notes	
Weekly Updates	Done	Strategy & Ops		Jul-31	1h 0m 0s	July Campaign Doc	
Go through 2019 resources created a...	In Progress	Strategy & Ops		Jul 31	1h 54m 56s	Google Doc	
[June Rollover] April Sp				Jul-16	9m 45s	Preview Link	
Minor client page char				Jul-19	10m 15s		
Mega Bundle LP Redes				Jul-25	34m 41s	https://offers.clear...	
[June Rollover] Update				Jul-25	35m 55s		
Build Chick-fil-a micros				Jul-25	5h 51m 36s	https://www.clear...	
[June Rollover] Build O				Aug 3	3h 45m 29s		
Update Chick-fil-A PDF with new links	Done	Design		Jul-31	13m 36s		
Onboarding Pillar pdf + mockup	On Hold	Design		Aug 2		https://docs.googl...	

In QueueUnder Internal R...Done

Client To DoAwaiting Client ...On Hold

Information Nee...Edits Needed

In ProgressApproved

Add/Edit Labels

jeep.png

Show All

A woman with long brown hair and round glasses is holding a smartphone to her ear. The image is overlaid with a semi-transparent green filter. On the left side, there are several white geometric shapes: a vertical line, two small circles, a double circle, and a larger circle with a central dot.

Transparency

Do your clients hug you?

Do your clients ask you about your birthday?

Do your clients stay with you for an average of 3+ years?

Do you charge a minimum of \$7500?

Do your clients have relationships with one another?



Collaboration



Transparency



Belonging

Results



Redbranchmedia.com

[@redbranch](#)

[@marenhogan](#)



Thank you.