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

What was good, gets bad FAST

- Thin margins
- Awful clients
- More employees
- More tech/tools
- New biz focus
- Service suffers
- Employee complaints
- Quality issues
- Payment delays
- Bigger space
- Shifted priorities

Services
The Problem with This

What was good, gets bad FAST

Leadership
Had to step in and fix it

Disengaged
Employees produced poor work

Clients
Got tired of waiting for the quality they were used to

Frustration
Set in and started the cycle all over

Reputation
Took a massive hit

Leadership

Disengaged

Clients

Frustration

Reputation
Memberships

What’s the difference between a client and a member?
Members vs Client

1. Relational member
2. Advisory member
3. Important member

1. Transactional client
2. Control-focused client
3. Urgent client
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

01
◆ Average the hours and activities
◆ Determine the best ones for each client
◆ Create a membership level document (take the time)

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.

03
◆ 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.

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
<table>
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<tr>
<th>Commitment to the Process</th>
<th>Regular Comms</th>
<th>Insights-Based Results</th>
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<tr>
<td>Clear Instructions</td>
<td>Energy to Keep Focused</td>
<td>Transparency into Hours and Activities</td>
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<tr>
<td>Technology to Enable</td>
<td>FAQs</td>
<td>Time and Expectation Management</td>
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More Money Honey
We started by building engagement, pods, teams and investing in our values.
Community
Community

- Consistency
- Familiarity
- Celebrations
- Identification
- Energy
- Meets the Needs
The Principles of Belonging, Collaboration, and Transparency
Belonging
Collaboration
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
Thank you.