



Monetize Your Advice

Workshop - Day 4

Ed Gandia & Austin L. Church



Marketing & Sales

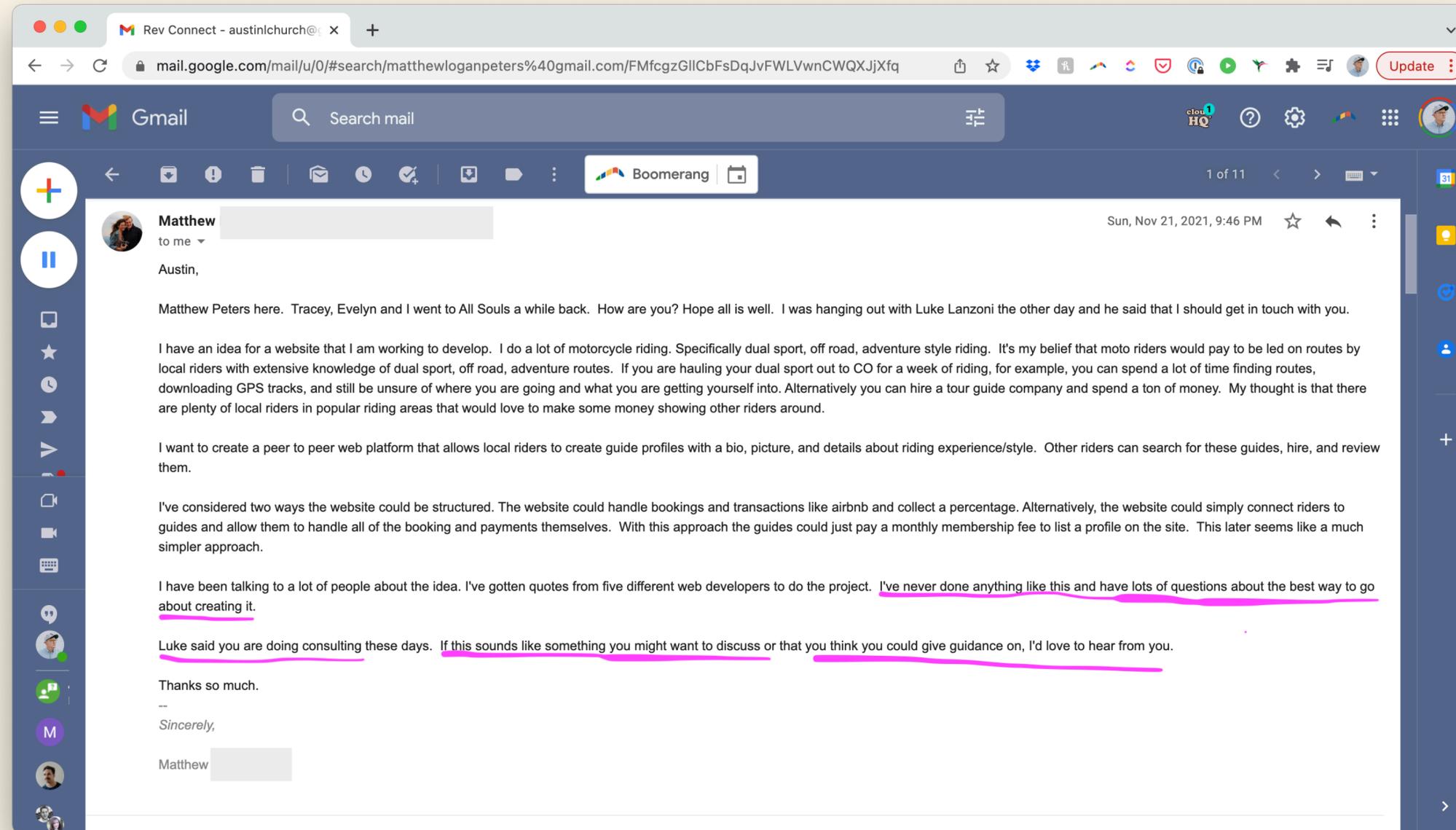
3 Buckets of Opportunities

- **Friends, family, colleagues**
- Niche you already have
- Niche you want to try

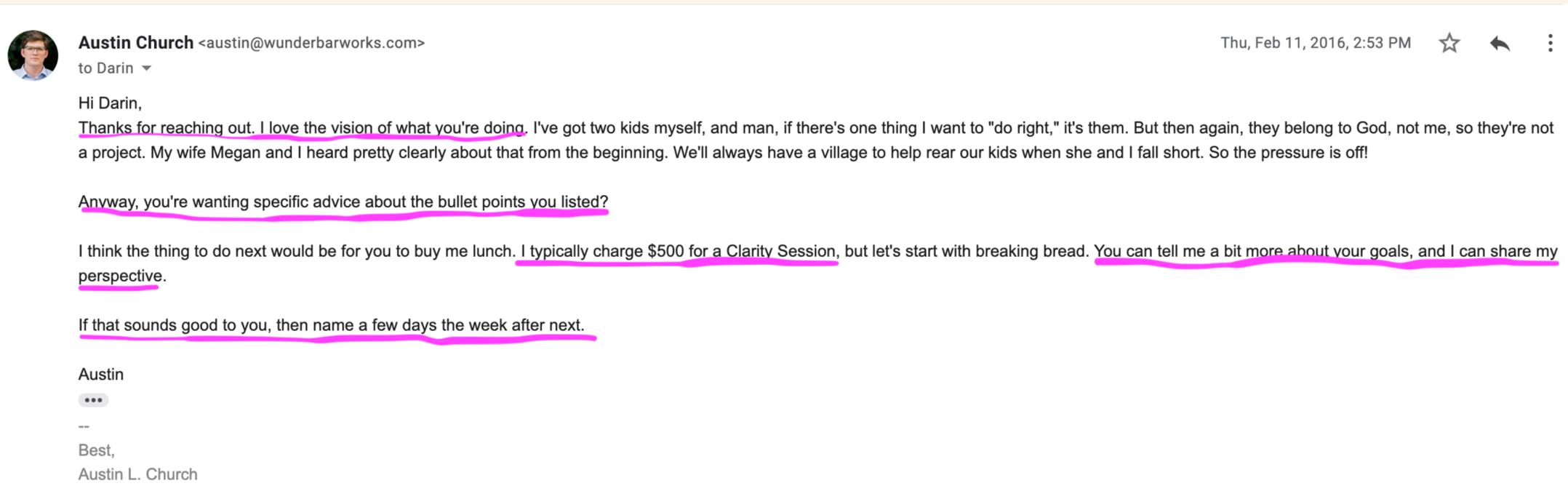
Opportunities in Disguise

When they get in touch, most people asking for strategy don't ask for strategy:

- "Can I pick your brain?"
- "Can I bounce some ideas off of you?"
- "Could you be a sounding board?"
- "Would you be willing to help me brainstorm BLANK?"
- "Could you give me some guidance on BLANK?"
- "I have questions about the best way to go about BLANK."



Friends, Family, Colleagues



Take the no-pressure approach.



Austin Church <austin@wunderbarworks.com>

to JD ▾

Tue, Apr 12, 2016, 2:44 PM



Cool. Glad to know that. I don't *have to* manage more than your brand right now, but I would like to know how my involvement will contribute to your bigger plan. I can better coordinate my own thinking and efforts that way. For example, maybe the goal is to spend more time with your family, so I wouldn't want to work on a speaking gig in Timbuktu. Or, if you want to sell everything in 5 years, then I won't be on the hunt for a sales exec or even a profitable SaaS app.

So I don't want to insinuate myself where I'm not needed, but I also want to create value however I can.

I connected with DJ over email. I haven't spoken with him on the phone yet. I postponed the April SPACE Retreat because 1) I've been traveling so much since March 16, and 2) I'm working on a sponsorship of some sort with Sage Fly Fishing.

How about next Tuesday afternoon? That will give you Monday to get back in the saddle. If that works for you, you can [use this link to book it.](#) I typically charge \$500 for these 90-minute roadmapping sessions. Our goal is to develop the plan that we'll work from for the next 6-12 months.

Austin



“I can also **guide you** and Tara through a Roadmapping Session. I friggin’ love Roadmapping because it **results in an actionable plan. We do a 90-minute work session where we get you clarity, set direction, and define next steps.** Roadmapping Sessions are typically **for people who know they need help with business development or branding but aren't quite sure where to put their focus.** The cost is a flat \$1,500 for the work session and deliverable, and the **deliverable is a clear roadmap for moving forward with confidence.** You can read more about the rationale behind Roadmapping here: [link].”

3 Buckets of Opportunities

- Friends, family, colleagues
- **Niche you already have**
- Niche you want to try

Client is *problem-aware*

****Red Outlined Circles Indicate Best Entry Points for Offering Strategy**



Unaware of Root Cause

Client: "Our sales team is having difficulty taking leads from initial conversations to proposals. Too many prospects aren't moving forward, and we don't know why!"

Freelancer: "I have an idea. Let's get together with several of your more insightful sales reps for a formal, structured brainstorming session and figure out potential causes and culprits. Then, we'll explore potential solutions. What do you think?"

Possible strategy flavors:

Brainstorming
Ideation
Problem-Solving

Unaware / Unsure of Proper Intervention

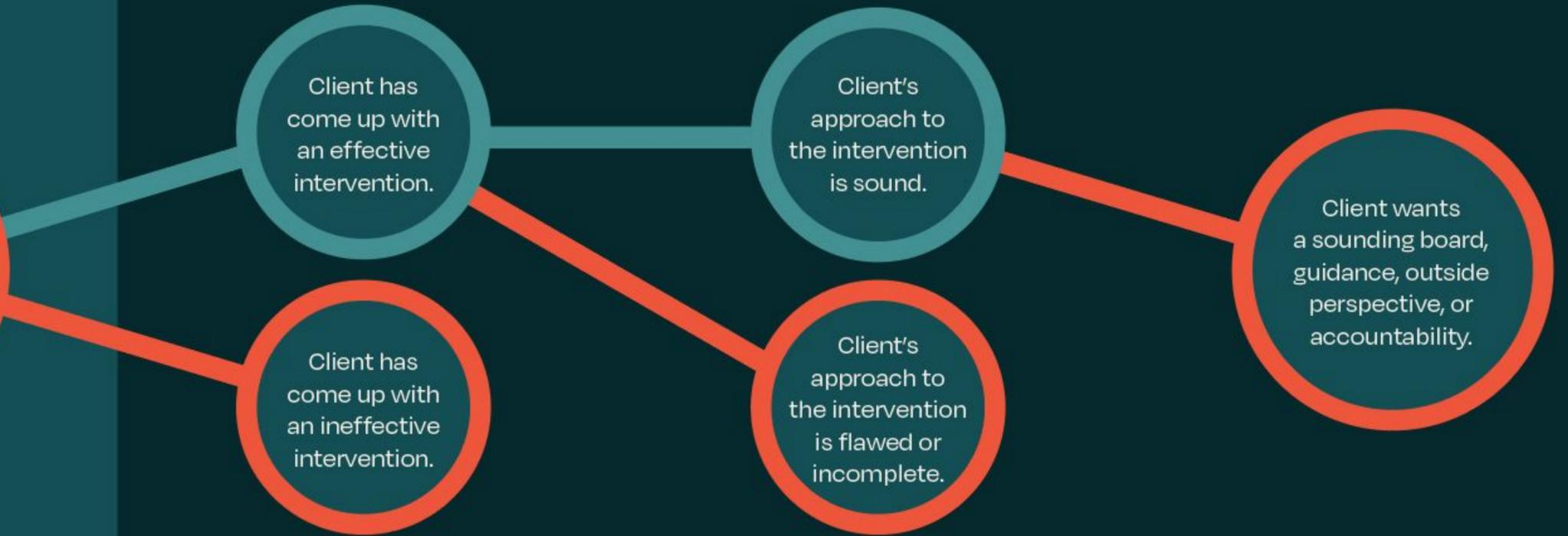
Client: "Our sales team is having difficulty taking leads from initial conversations to proposals, and we know why. Decision-makers in our market have been conditioned to take a narrow view of the root problem and thus viable solutions to it. Our different approach and solution are very effective. However, because they fall outside that narrow view, our prospects struggle to see them and choose competitors over us."

Freelancer: "What if we start by cataloging all the objections your sales team hears? Then, we can explore different ways to overcome those objections. I have a specific workshop for this very purpose. Any interest?"

Possible strategy flavors:

Brainstorming / Ideation / Problem-Solving
Paid Discovery / Project Roadmapping
Content / Copy Strategy
Marketing / Growth Strategy
Product Strategy
High-Level Business Strategy

Client is *problem- and solution-aware*



Effective Intervention

Client: "We need to expand our prospects' narrow view and reframe how they think about the problem. A white paper will help us do this earlier in the buying process."

Freelancer: "I agree. What approach to the white paper do you have in mind?"

Ineffective Intervention

Client: "We need to launch a new blog with articles that show how great our product is."

Freelancer: "Tell me more about your thought process. How did you all decide that blog posts would help you close more deals? Did you consider any other approaches, like a white paper?"

Possible strategy flavors:

Brainstorming / Ideation / Problem-Solving
Paid Discovery / Project Roadmapping
Content / Copy Strategy
Marketing / Growth Strategy
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Sound Intervention + Sound Approach

Client: "Our white paper needs to build an objective business case for why our approach and product features and benefits are the best. It won't be a sales pitch. It will present the best solution in a matter-of-fact way."

Freelancer: "That all makes sense to me. Do you see any potential obstacles here?"

Sound Intervention + Flawed Approach

Client: "This white paper needs to showcase all the great features and benefits of our product. We need a really solid pitch."

Freelancer: "Oh, interesting. Are you open to another perspective? Based on my past experience with white papers, I believe a different approach could be more effective."

Possible strategy flavors:

Brainstorming / Ideation / Problem-Solving
Paid Discovery / Project Roadmapping
Content / Copy Strategy
Marketing / Growth Strategy
Product Strategy
High-Level Business Strategy

Outside Perspective / Guidance

Client: "Yes. We know what we need to do to create the best piece possible, but we also have many cooks in the kitchen. We could use a sounding board and outside perspective as we move through the process of creating it. We'd love your help with that."

Freelancer: "I'd be glad to help and recommend that we start with my Effective White Papers engagement. That way, we create a winning outline and get consensus around that before diving straight into writing."

Possible strategy flavors:

Brainstorming / Ideation
Advisory / Consulting
Project Chiefing / Shepherding
Social, Blogging, Thought Leadership Strategy
Brand Strategy
Web / Funnel / Email Strategy
Launch / Go-to Market Strategy



Detective vs. Cook

Instead of acting like a short order cook writing down requests, you act like a detective searching for the truth:

- Ignore the client's initial request ("I want...").
- Ask thoughtful questions to peel back layers until you're both looking at the core problem, need, or opportunity ("What I really need is...").
- Uncover more ways you can help.
- Position yourself as an expert.
- Build trust.



<https://bit.ly/consultingquestionstoolkit>



Ask open-ended questions like these:

- Pretend I know nothing, and tell me, why are we here?
- What else is causing you headaches?
- What's the real challenge here?
- What have you already tried?
- What would a home run look like?
- What else would you like to see happen?
- Are there any other opportunities I should know about?

Remember...

If you listen closely, people will always tell you what they want to buy and how they want you to sell it to them.

**Use their language
whenever possible,
and refine your
messaging over time.**

Me: ~~“Actionable brand strategy”~~

Client: “We have many messages. We don’t have a focused brand strategy that allows us to give a consistent message to our audience. Across all advertising and branding, we need consistency and a fresh start.”

Me: “Right now, you’ve got many messages. Across all your advertising and branding, you need consistency. You need a fresh start. Let’s create focused brand strategy that allows you to give a consistent message to your audience.”

3 Buckets of Opportunities

- Friends, family, colleagues
- Prospects you already have
- **Niche you want to try**

How will you put this offer in front of people?

- Put your offer in a GDoc.
- Think of 10 people in the niche or target audience—e.g., existing network (friends, family, former coworkers, past clients, someone at church), LinkedIn connections, etc.
- Ask them if they'll poke holes in your offer and say you're happy to spot their coffee (or whatever).
- Use their feedback to iterate and improve it.
- Finalize the GDoc and add a way to pay (e.g., Stripe Link).
- Follow up with the 10: "Would you pay \$XXX for this now? Why or why not?"
- Close 2 of them if you can.
- Find 50 more prospects on LinkedIn.
- Start one conversation a day.
- Pay attention to what wants to happen.

Closing the Deal

- Hop on a discovery call (30-45 minutes).
- Ask open-ended, consultative questions.
- If the client seems to already have sufficient clarity around the need, problem, or opportunity, send a quote.
- When you see an entry point, explain your offer.
- If need, send a recap email with more information about your office, including the write-up and booking and payment link.*
- Follow up.
- Keep following up, at least five times, and assume the answer is yes until you get a clear no.

Ways to Share Offers

- Offer Deck
- Web Page
- GDoc
- Boilerplate Copy for Emails
- Boilerplate Copy for DMs

1-Day Brand Sprints

Service professionals in crowded markets book a sprint with me when they need actionable brand strategy and don't want to wait months.

Balernum

Web Page

All of our new client relationships get started the same way:
a formal Roadmapping session.

WHAT IS ROADMAPPING?

Glad you asked.

We spend 90 minutes answering a series of questions—peeling the layers off the onion, so to speak—in order to help you gain clarity, set direction, and identify next steps.



Maybe your marketing isn't working, and you feel stuck.
Maybe your software developer keeps missing deadlines. You're not sure how to remedy the situation.
Maybe you need to hire two new sales reps, but you can't find good candidates.

We can troubleshoot expensive business problems and find the way forward.

We will send you away with a Roadmap that you can use—whether or not you choose to engage us for implementation.

Examples of Past Roadmapping Sessions

Media Production Company

Outlining minimum marketable feature set for photo editing app in order to get accurate quotes from dev shops

Higher Ed Consultant

Designing strategy to get more speaking gigs because that's where the principal really wanted to grow her business

Registered Investment Advisor

Scoping out website redesign project in order to not overspend

Entrepreneur & Tech Consultant

Creating Table of Contents for LinkedIn blogging to build awareness for his coding bootcamps

Attorney

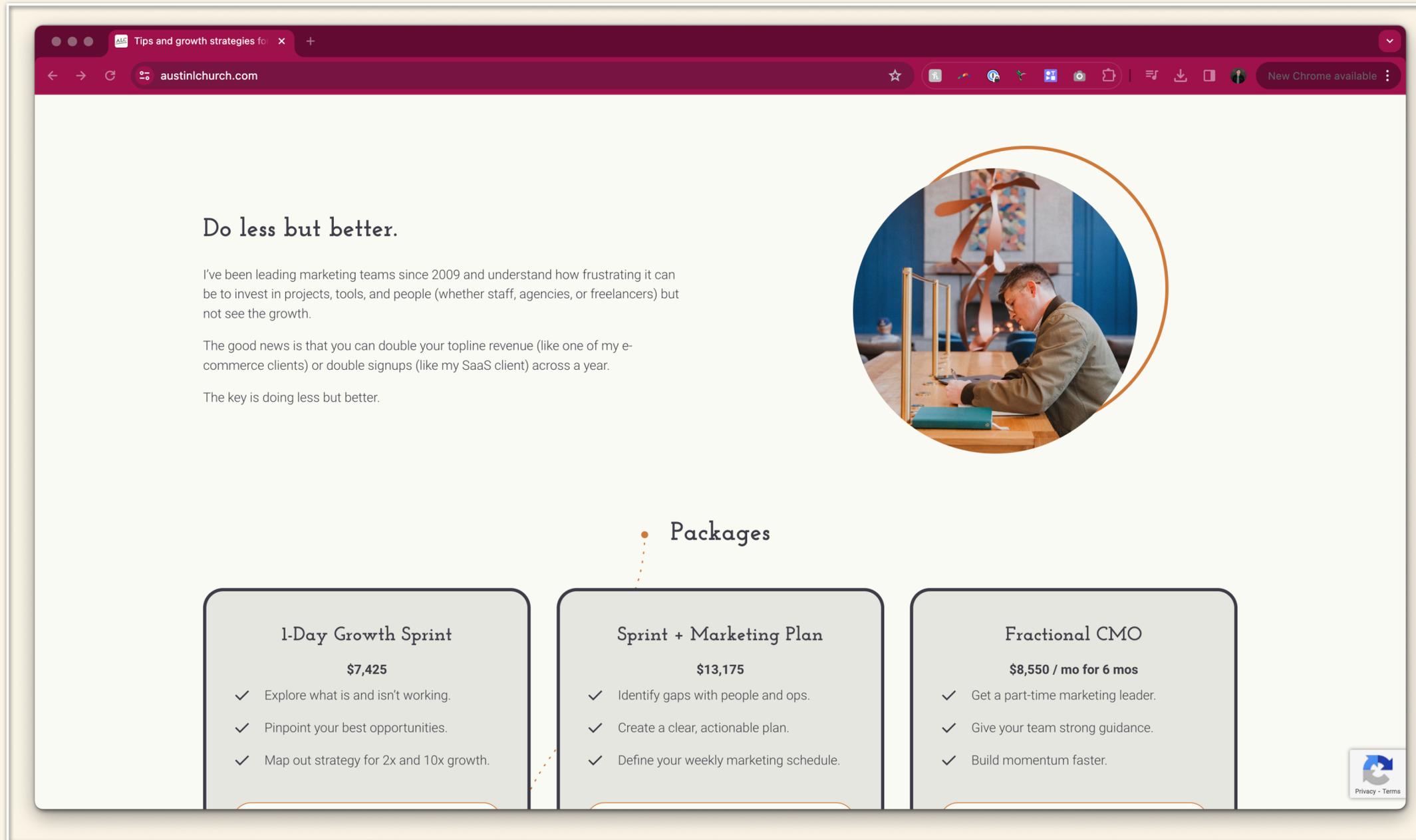
Improving branding and positioning so that he could get more clients

iOS Dev Agency

Developing content strategy for website redesign, blog, internal process documents, and lead magnet

Agency Owner

Developing personal brand and curating executive story so that he could generate more high-value client leads for his various businesses



Tips and growth strategies for ✕ +

austinlchurch.com

New Chrome available

Do less but better.

I've been leading marketing teams since 2009 and understand how frustrating it can be to invest in projects, tools, and people (whether staff, agencies, or freelancers) but not see the growth.

The good news is that you can double your topline revenue (like one of my e-commerce clients) or double signups (like my SaaS client) across a year.

The key is doing less but better.



Packages

<h4>1-Day Growth Sprint</h4> <p>\$7,425</p> <ul style="list-style-type: none">✓ Explore what is and isn't working.✓ Pinpoint your best opportunities.✓ Map out strategy for 2x and 10x growth.	<h4>Sprint + Marketing Plan</h4> <p>\$13,175</p> <ul style="list-style-type: none">✓ Identify gaps with people and ops.✓ Create a clear, actionable plan.✓ Define your weekly marketing schedule.	<h4>Fractional CMO</h4> <p>\$8,550 / mo for 6 mos</p> <ul style="list-style-type: none">✓ Get a part-time marketing leader.✓ Give your team strong guidance.✓ Build momentum faster.
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[Privacy - Terms](#)

GDoc

Wayfinding Workshop with Balernum

Founders and digital agency owners don't need to be told to take risks, make difficult decisions, or work smart, not hard. That just comes with the territory. Entrepreneurs start a business because we're more motivated by upside and impact than comfort and safety.

However, even go-getters need outside perspective from time to time.

Ambiguity, overanalysis, procrastination, and perfectionism—these are our enemies. They waste precious time. They get in the way of the growth that wants to happen.

Clarity leads to confidence, and my Wayfinding Workshop gives you the chance to get clarity, identify the various paths forward, pick the best one, and define next steps.

We won't attempt to iron out every wrinkle. Instead, we'll focus on the one problem, opportunity, or outcome that will make the workshop worth \$50,000 or \$100,000 to you. We'll ask the right questions then do deep problem-solving:

- What is most important right now?
- What does your business need from you?
- What decisions have you been putting off?

Here is the process:

1. I send you the short discovery questionnaire in advance to help uncover your current needs, bottlenecks, and obvious wins.
2. I customize the workshop's structure based on your questionnaire and how you fill in the blanks in this statement: "It would be awesome if I could [blank] so that I could [blank] without worrying about [blank]."*

**For example, one client wrote this: "It would be awesome if we could empower and enable our operations manager to manage day-to-day ops and our in-progress projects so that I could help build out our sales processes while getting more free time to also work on other projects and spend time with my wife."*

We can proceed in a couple of different ways:

1. Coaching – We'll do one or two sounding board calls each month where you bring your priorities and any knots that need unraveling. I ask open-ended questions to help you get clarity, set direction, and define next steps. We can supplement these calls as needed with homework, exercises, and deadlines and otherwise pour fuel on your fire. I usually charge \$250 per call and charge for the first 3 months up front. My recommendation would be that we do 2 calls per month for 3 months, and then reevaluate after 90 days.
2. Roadmapping – I can also guide you and Tara through a Roadmapping Session. I friggin' love Roadmapping because it results in an actionable plan. We do a 90-minute work session where we get you clarity, set direction, and define next steps. Roadmapping Sessions are typically for people who know they need help with business development or branding but aren't quite sure where to put their focus. The cost is a flat \$1,500 for the work session and deliverable, and the deliverable is a clear roadmap for moving forward with confidence. You can read more about the rationale behind Roadmapping here: <https://balernum.com/schedule-margin-and-solve-your-dwayne-johnson-problems>.

It's also worth mentioning that I have a ton of talent at my disposal. Chris is an absolute freak when it comes to branding, design, and websites. Pretty much everything he touches turns to gold. If you and Tara do have need of anything from identity design to UI/UX, strategy to e-commerce, then Chris is your guy. What Chris and I have in common is an obsession with branding. Ha.

Think it over. Discuss with your sister. And let me know if you have any questions! We can connect later this week to decide next steps.

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Email

Where do you start?

Create a GDoc (“24 of Your Best Post Ideas in 60 Minutes”) and paste in crappy first draft of your juicy offer.

Sign up for a free Calendly account and create the event: “24 of Your Best Posts in 60 Minutes.”

Brainstorm a list of 10 people in your target audience you already know. (Be sure to check your LinkedIn connections.)

Reach out and ask if they’d be willing to shoot holes in your rough draft.

Use their feedback to iterate your offer.

Follow up with the revised offer and ask, “Would you pay \$XXX for this now? Why or why not?” Iterate as needed.

Close 1 prospect if you can.

Sales Process

Find 50 more prospects on LinkedIn or get creative in how you identify them—e.g., SaaS-focused startup accelerators in the Southeast U.S.

Add them to your simple tracking system (e.g., GSheet).

Show up on their radar in other ways / places and plan on putting in at least 5 “touches.”

Start writing and posting about the offer.

Pitch 1 person a day. (Depersonalize the outcome. You’re still testing the offer.)

Invite them to a 20-minute discovery call—no strings attached.

Iterate your offer. Pay attention to what wants to happen.

Objections

"We've never paid for strategy before."

"I'd rather just save this money for the project."

"Maybe in the future, but we really need a fast turnaround on this project."

"Let me think about it. Let's touch base soon."

"We don't have budget for this."

"We just don't see the value."

Holding Your Ground

“If you haven’t been satisfied with past results without strategy, you might consider trying something different this time and starting with strategy.”

“If you all already had a clear roadmap for this project and the desired outcomes, I’d recommend we dive right in. I suggested this because there’s still ambiguity, and I’d feel more comfortable helping you create an actionable plan first. We’ll probably discover a better plan together.”

“I totally feel your urgency. What I hear you saying is you’re going to move forward with this project whether I’m the one helping or not. If that’s the case, would you agree to a shorter session, say 30 minutes? It would cost \$XXX. We can get that scheduled ASAP.”

“Take all the time you need. I’ll follow up in a week.”

“I totally understand budget constraints. If you were to pick your single highest priority, what would it be?”

“In terms of value, I think it comes down to clarity, confidence, and an actionable plan. In the past, when I have agreed to dive in head first while there’s still ambiguity, we end up wasting time and effort on moving targets and dead ends. I proposed this session because I want to protect your time and budget and get the relationship started on the right track.”

Selling the Value

Clients who value strategy don't need to be sold on the value of strategy.

People who are always running and gunning need help connecting the dots between the lack of strategy and lackluster results.

Some clients will always prefer speed and execution over strategy even if that approach has proven ineffective. You can't easily sell them strategy, and they typically don't make great long-term clients anyway.

The value is the client's clarity, confidence, and an actionable plan—not a quantifiable dollar amount.

Put the burden of framing the value on the client: "What single outcome would make this session worth \$XXXX to you?"

Repeat that back multiple times before the session, during, and when you deliver the report: "You said getting clarity around X would be worth \$XXXX with you. Our session was really productive, and I'm honored you invited me in. Here's the report...."

Terms & Conditions

I typically don't use a contract for one-off strategy engagements, only for longer engagements with lots of deliverables.

With that said, I give the client the option and offer to send my MSA if they're more comfortable with that.

I don't guarantee "results," only the actionable plan.

I ask clients to pay 100% up front.

I don't schedule the session until the client has paid.

I usually have the report in their hands within 2-3 days.

Basic Legalese

“You agree that this Service provides you strategy and does not, in any way, do the work for you. This is not a ‘done-for-you’ service. You are responsible for taking action on Provider’s advice.”

“You agree that this service is provided on an ‘as is’ basis without warranty or guarantee of results beginning when you sign this agreement.”

“You understand that you are not eligible for payment delays or refunds for the Service already delivered.”