



Monetize Your Advice

Workshop - Day 5

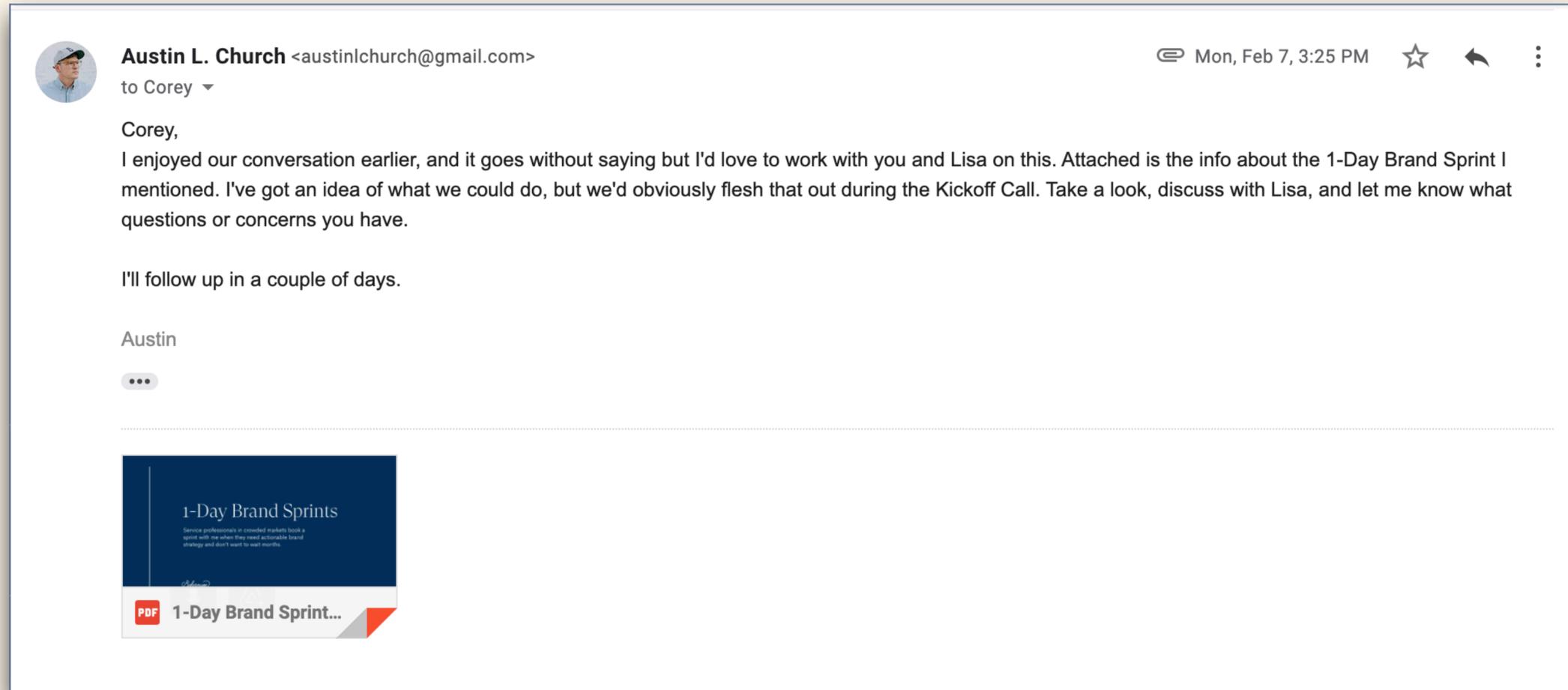
Ed Gandia & Austin L. Church



Strategy Engagement Steps & Workflow

1. Share the offer and get the yes.
2. Send the invoice and questionnaire.
3. After the client pays, you schedule the session.
4. Facilitate the session by asking open-ended questions, defining the problems, and identifying available paths forward.
5. Take notes and repeat back what you have heard.
6. Turn your notes into a report and actionable plan.
7. Deliver the report within 2-3 days. **Optional:** If you like the client, include 2-3 options for execution or ongoing collaboration in your report—i.e., the next step up on your value ladder.

Example



Share the offer.

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

Slide Deck

 **Corey Freels** Feb 7, 2022, 3:36 PM ☆
Got it and forwarded to Lisa. What will we walk away with? As you stated, we have vision, we need direction and tactics. A brand book? Help with logo d...

 **Austin L. Church** Feb 7, 2022, 5:31 PM ☆
In your case, the concrete takeaways I typically recommend for a brand book are laid out below. Typically, defining all these pieces takes 2 days, not 1, s...

 **Corey Freels** Feb 8, 2022, 2:50 PM ☆
See below. Subject: RE: four building blocks of brand I like the concept- can I see some examples of some cohesive branding from a sprint day? Lisa Wi...

 **Austin L. Church** Feb 8, 2022, 3:26 PM ☆
Sure. Here's a fairly diverse group of examples: - Maker City Church - Hansel for Boys - Breedwise - Veritas Academy - OMWorks - Lyndon Heath Cabin...

 **Corey Freels** Feb 8, 2022, 10:15 PM ☆
See below. This is a big deal and we need some help. Connect tomorrow or end of week? Corey Freels Branch Manager LTW Group MIG NMLS 108339...

 **Austin L. Church** <austinlchurch@gmail.com> Feb 9, 2022, 2:58 PM ☆ ↩ ⋮
to Corey ▾
Sure. Give me a call today or tomorrow. If this means we've got the green light, we can start looking at dates for the Kickoff Call and sprint itself.

Re: who should be there?... I think the final attendee list depends upon the specific pieces you all want to knock out. For example, if we add brand experience to the list, you may want some of your front-of-office people to show up for that and weigh in on the best ways to make your brand values seen and felt at each stage of a "deal."

Answer questions. Get the yes.



Invoice #202124

Billing address: Lisa Wiles, The LTW Group, 120 S Gay St #401, Knoxville, TN 37902 USA

Terms: Due on receipt

Invoice date: 02/16/2022

Due date: 02/16/2022

Invoice no.: 202124

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
1	Branding:Branding	1-Day Brand Sprint	1	3,275	3,275.00
2					

Message on invoice: This will show up on the invoice.

Message on statement: If you send statements to customers, this will show up as the description for this invoice.

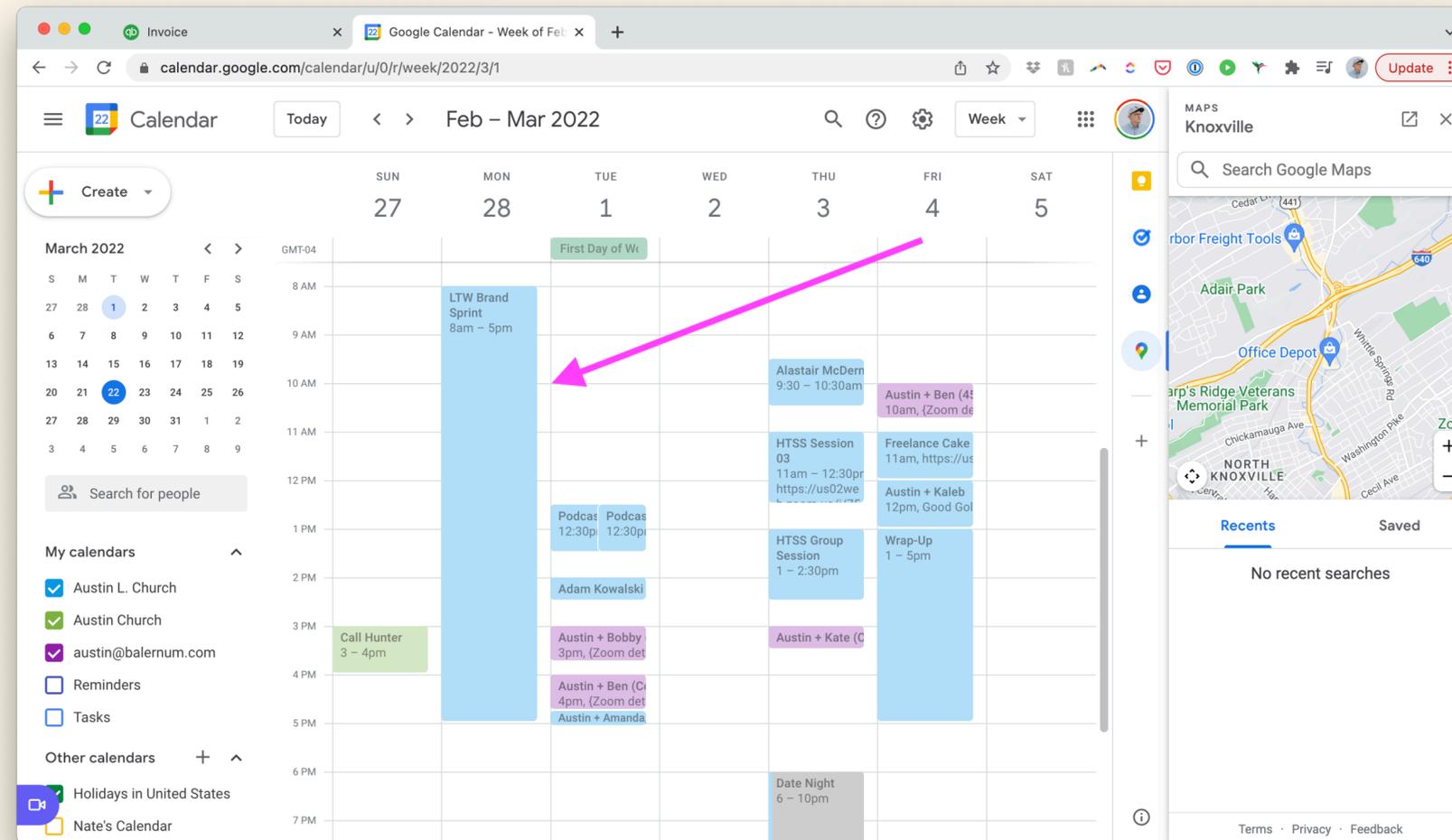
Total: \$3,275.00

Amount received: \$3,275.00

Balance due: \$0.00

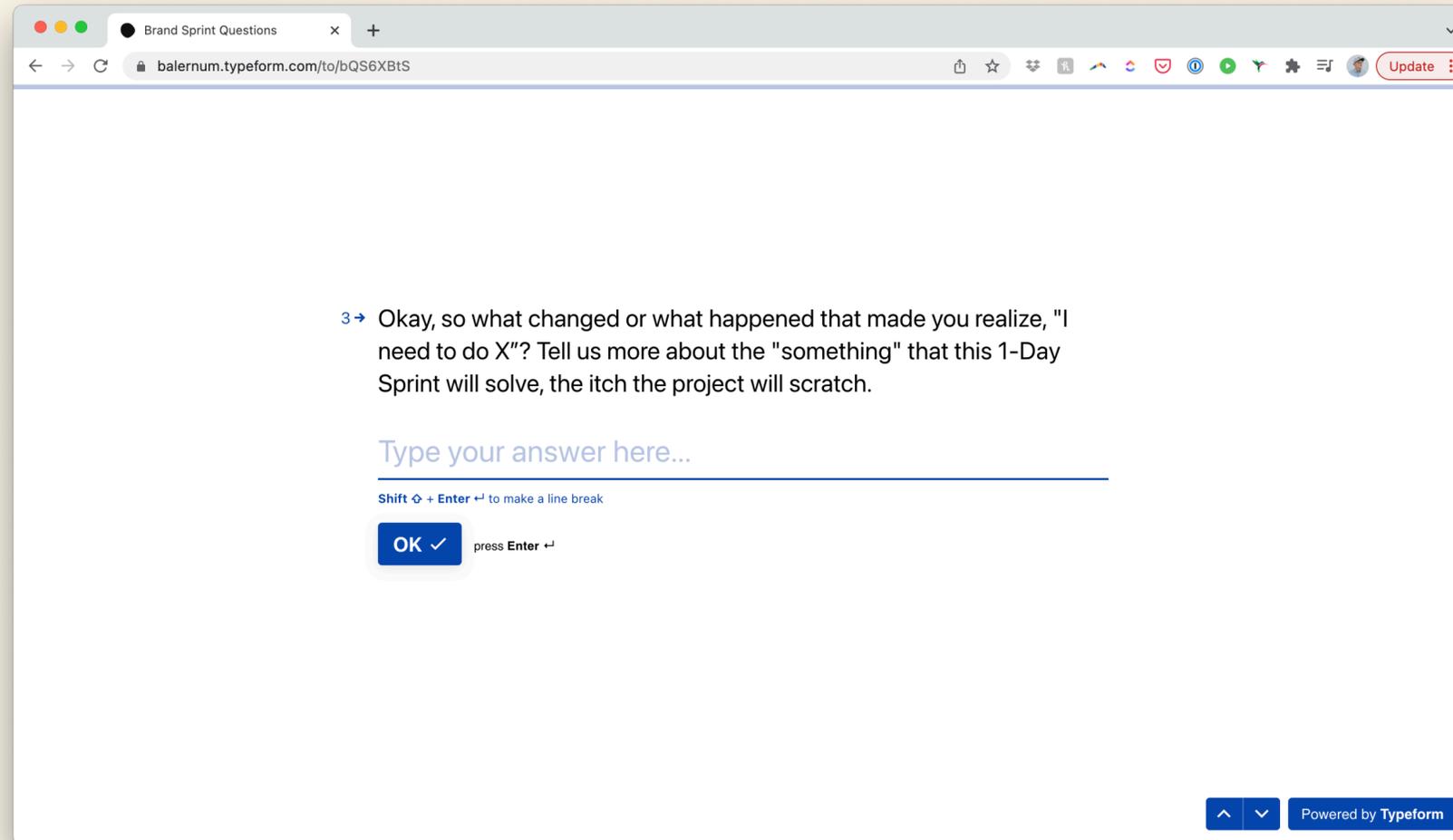
Buttons: Cancel, Print or Preview, Make recurring, Customize, More, Save, Save and send

Send the invoice.



Calendar interface showing a weekly view for February and March 2022. A pink arrow points to a slot on Monday, February 28th, between 8 AM and 5 PM, which is currently occupied by a blue event titled "LTW Brand Sprint". The calendar interface includes a "Create" button, a month view for March 2022, and a list of calendars on the left. On the right, there is a Google Maps widget showing a map of Knoxville, TN.

Schedule the session.



Brand Sprint Questions

balernum.typeform.com/to/bQS6XBtS

3 → Okay, so what changed or what happened that made you realize, "I need to do X"? Tell us more about the "something" that this 1-Day Sprint will solve, the itch the project will scratch.

Type your answer here...

Shift + Enter to make a line break

OK ✓ press Enter

Powered by Typeform

Send the questionnaire.

Okay, so what changed or what happened that made you realize, "I need to do X"? Tell us more about the "something" that this 1-Day Sprint will solve, the itch the project will scratch.

"we have many messages and mortgages are complicated- we dont have a focused brand/ strategy that allows us to give a consistent message to our audience"

Review responses.

Okay, so what changed or what happened that made you realize, "I need to do X"? Tell us more about the "something" that this 1-Day Sprint will solve, the itch the project will scratch.



"we have many messages and mortgages are complicated- we dont have a focused brand/ strategy that allows us to give a consistent message to our audience"



Create a focused brand strategy that allows you to give a consistent message to your audience.



Confirm goal.



The LTW Group

Brand Sprint Agenda

1. FOUNDATION

- Brand Purpose
- Core Values / Operating Principles

2. STRATEGY

- Goals (Business + Brand)
- Audience
 - Client Diary (Pains + Wants)
 - Frustrated Avatar + Future-Based Hero
- Positioning
 - Key Differentiators
- Messaging
 - Value Proposition
 - Messaging Pillars
 - Wordbank (Words, Phrases, Ideas)

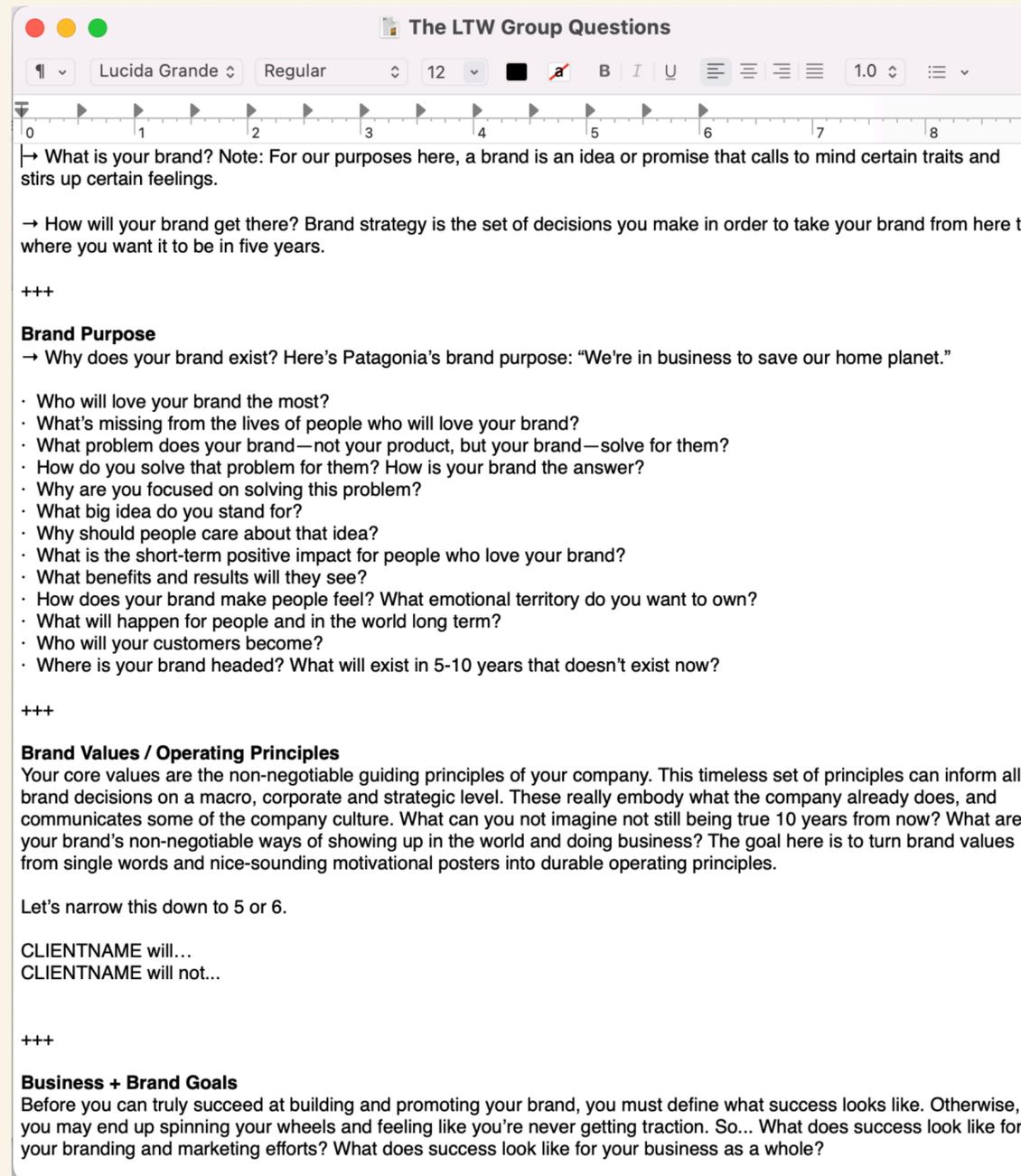
3. IDENTITY

- Visual Language Exercise

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A BRANDING & MARKETING STUDIO

Create agenda.



The screenshot shows a text editor window with the following content:

→ What is your brand? Note: For our purposes here, a brand is an idea or promise that calls to mind certain traits and stirs up certain feelings.

→ How will your brand get there? Brand strategy is the set of decisions you make in order to take your brand from here to where you want it to be in five years.

+++

Brand Purpose

→ Why does your brand exist? Here's Patagonia's brand purpose: "We're in business to save our home planet."

- Who will love your brand the most?
- What's missing from the lives of people who will love your brand?
- What problem does your brand—not your product, but your brand—solve for them?
- How do you solve that problem for them? How is your brand the answer?
- Why are you focused on solving this problem?
- What big idea do you stand for?
- Why should people care about that idea?
- What is the short-term positive impact for people who love your brand?
- What benefits and results will they see?
- How does your brand make people feel? What emotional territory do you want to own?
- What will happen for people and in the world long term?
- Who will your customers become?
- Where is your brand headed? What will exist in 5-10 years that doesn't exist now?

+++

Brand Values / Operating Principles

Your core values are the non-negotiable guiding principles of your company. This timeless set of principles can inform all brand decisions on a macro, corporate and strategic level. These really embody what the company already does, and communicates some of the company culture. What can you not imagine not still being true 10 years from now? What are your brand's non-negotiable ways of showing up in the world and doing business? The goal here is to turn brand values from single words and nice-sounding motivational posters into durable operating principles.

Let's narrow this down to 5 or 6.

CLIENTNAME will...

CLIENTNAME will not...

+++

Business + Brand Goals

Before you can truly succeed at building and promoting your brand, you must define what success looks like. Otherwise, you may end up spinning your wheels and feeling like you're never getting traction. So... What does success look like for your branding and marketing efforts? What does success look like for your business as a whole?

Gather questions.



- types of mortgages ^{steps in the process}
benefits & drawbacks
 - ✓ • bad experience in the past
 - fear of rejection
 - ✓ ↳ bad credit
 - ✓ ↳ being swindled
 - feeling exposed (lose privacy)
 - ✓ • stress (relocating, starting new jobs)
 - refinancing (transitory, divorce)
 - stigma of the industry as a whole
 - uncertainty about buying home
 - true costs
 - Is this even a wise decision for us right now?
 - get deflated. "Fuck."
 - very emotional decision
 - "Are we being precious about this?"
 - This can be no strings attached.
 - embarrassed
- dream home / forever home → where our roots will be where we'll make our memories w/ kids
 - comfortable
 - good investment
 - confidence
 - navigate this market really well
 - confidence in the process (and my advisor)
 - Be smarter than I was before.
 - Genuine interest in my journey
 - Restored faith in the industry
 - Encouragement & hope
 - Free pep talks!
 - Feeling informed, cared for
 - good ban w/ not ending up w/ a shady LO
 - work with the best ^{transparency} people
- Do it when it's not scary. Start the process. Just want to know what it would take.

transformation

Take notes.

Contents

- [Brand Purpose](#)
- [Values](#)
- [Goals](#)
 - Business
 - Brand
- [Client Diary](#)
- [Two Customer Avatars](#)
- [Key Differentiators](#)
- [Value Proposition](#)
- [Messaging Pillars](#)
- [Wordbank](#)
- [Visual Language Exercise](#)

Brand Purpose

→ *Why does your brand deserve to exist?*

The LTW Group exists to elevate our team members, clients, partners, and community. We genuinely care about making people successful, and this holistic approach to doing business defines our brand and company culture.

...

Values (aka, Operating Principles)

→ *What are your brand's non-negotiable ways of showing up in the world and doing business? The goal here is to turn brand values from single words and nice-sounding motivational posters into durable operating principles.*

1. **Lead the way.** That's what LTW stands for, and that's how we think of ourselves as mortgage advisors, not just loan officers. We set the standard and stay ahead of it. We like to win, but that competitive drive
2. **Care like a healthy tribe.** We lean on each other. We ask for help because sometimes another person has more experience with a particular situation or type of loan. We're willing to give up a small win for ourselves to get a big win for a client. When one of us wins, we all win.
3. **Think, "Huzzah!"—always.** Huzzah comes from the word sailors shouted in celebration, and before that, from the word "hoise," meaning "to hoist," or "to lift up." We're a fun, dynamic, high-energy bunch who work hard and play hard. We achieve our goals by uplifting one another. Onward and upward, always!

Draft report.

LTW brand strategy >



Austin L. Church <austin@balernum.com>

Fri, Mar 4, 4:58 PM



to Corey ▾

Corey,

I know you said there's no rush and I know you've got your hands full right now! (I hope the transition has been better than expected).

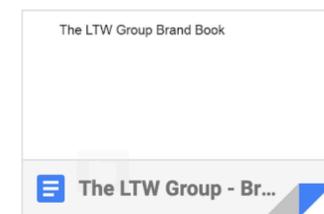
Regardless, here's the new and improved [The LTW Group brand book](#).

Next week, I'll flow it into the prettier doc you saw me use for other clients.

Thanks again for entrusting me with this process. Five people who care about the company, their clients, and one another make it SO much easier.

Hope you have a beautiful weekend, friend, and get some rest.

Austin



Send email.

The LTW Group

BRAND GUIDE

Balernum

Finalize report.

Delivery



We lead our clients **before, during, and after** strategy sessions.

A thoughtful, **premium client experience** contributes to the perceived value of the engagement. You start creating that value as soon as your questions force the client to gather her thoughts.

Best Practices for In-Person Sessions

- Find an off-site location.
- When you send the onboarding questionnaire, send a gift card for coffee.
- Print agenda on creamy card stock for in-person meetings.
- Pay for everything—e.g., coffee, pastries, lunch, snacks, fancy water.
- Set up before the client arrives.
- Be the gracious host.
- Bring the fun.
- Share a “Best Of” list.
- Show up with swag—e.g., my Balernum hat.

Best Practices for Online Sessions

- When you send the onboarding questionnaire, send a gift card for coffee.
- Set expectations beforehand.
- Work through any tech issues before the client arrives.
- Minimize any and all interruptions—e.g., turn on “Do Not Disturb” on your computer, close out apps that hog bandwidth, put your animals, including children, in another room.
- Take notes on pen and paper.
- Have a backup plan (e.g., Zoom, Hangouts, Skype, etc).
- Radiate confidence even when you don’t feel it.

Facilitating Sessions



Your job is to help the client get **clarity, confidence, and traction** by making decisions and taking initial steps down a path. Your job is not to find and fix all their problems.

During the Session

Share the agenda.

State the goal—“Why We’re Here.”

Ask open-ended questions and take notes.

Guide the client through **four phases: Diagnose, Discuss, Decide, and Define.**

Format & Flow

5 Minutes → Get settled, restate the goal, and quickly review the agenda.

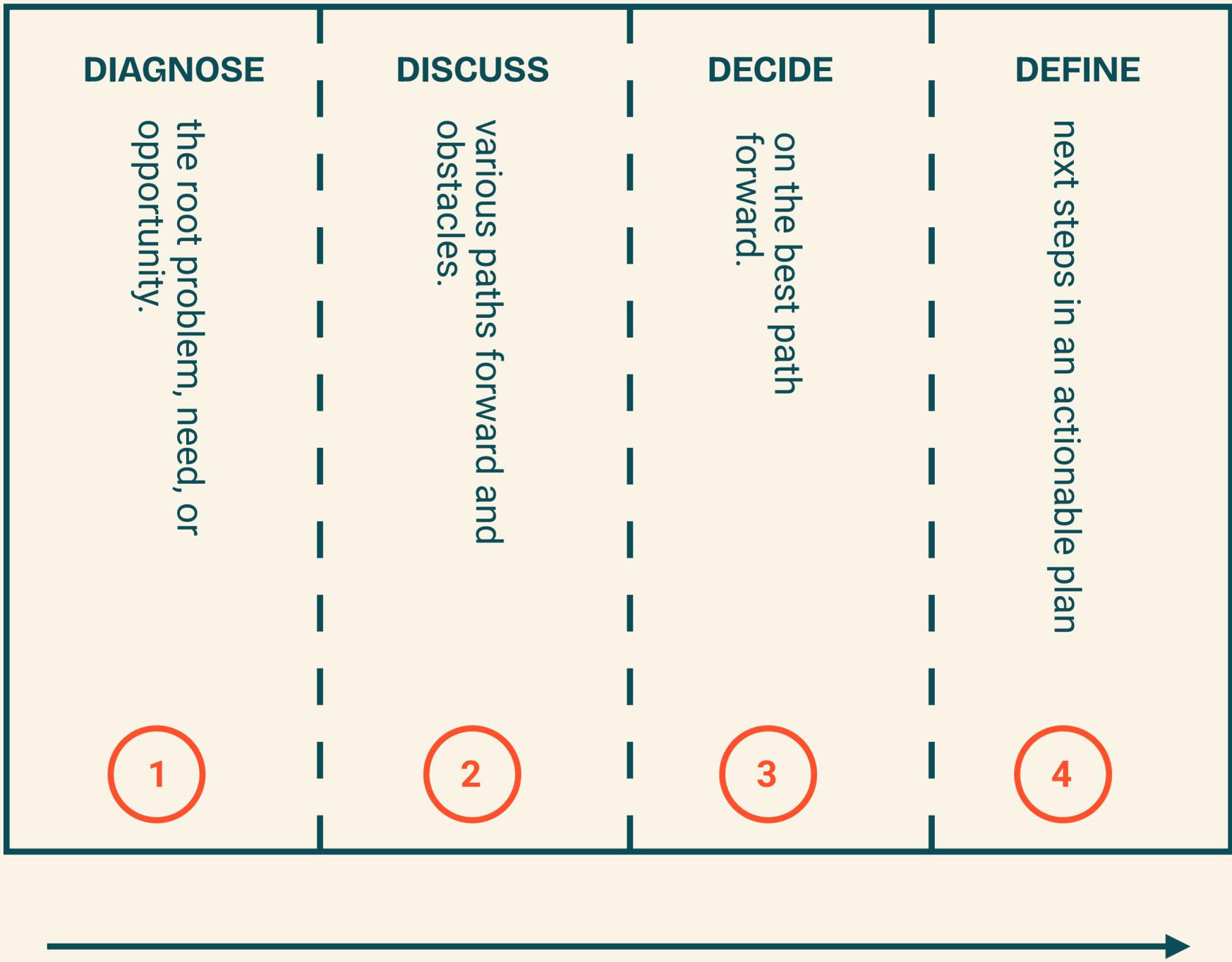
10 Minutes → **DIAGNOSE** the root problem, need, or opportunity, as needed.

15 Minutes → **DISCUSS** the various paths forward.

10 Minutes → **DECIDE** on the best path forward.

45 Minutes → **DEFINE** next steps and actionable plan.

5 Minutes → Wrap up and explain next steps.



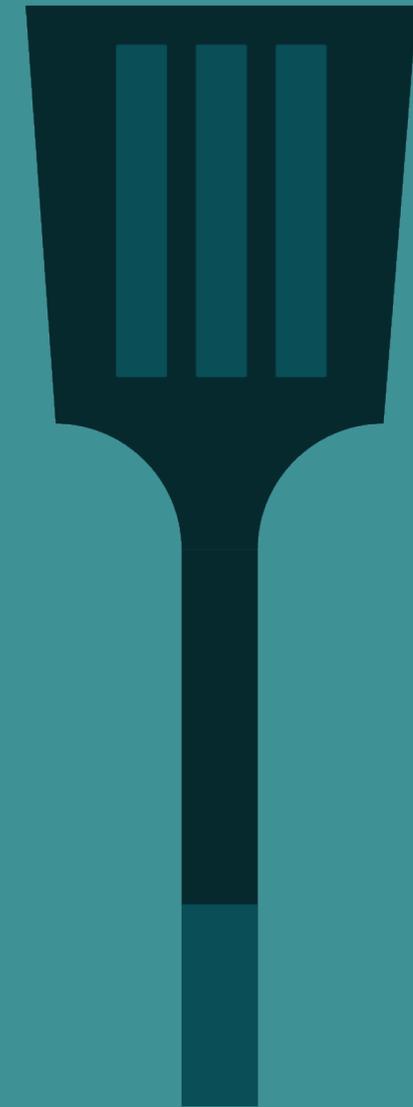
DIAGNOSE	DISCUSS	DECIDE	DEFINE
<p data-bbox="892 508 1159 714">“Let’s restate why we’re here....”</p> <p data-bbox="892 761 1136 1193">“Okay, so if we got clarity and came up with a plan for X, then you’d leave satisfied?”</p>	<p data-bbox="1336 480 1626 742">“You already tried Z. What were the results?”</p> <p data-bbox="1336 761 1626 1249">“You’re interested in A, but clearly something has held you back. Let’s dig into that.”</p>	<p data-bbox="1769 480 2059 799">“What I hear you saying is that P is the best path forward?”</p> <p data-bbox="1769 892 2059 1174">“Let’s talk through the blockers, needs, and tasks.”</p>	<p data-bbox="2169 480 2459 752">“It seems like the first step is C. Would you agree?”</p> <p data-bbox="2169 836 2459 1061">“Before you can E, you have to D, right?”</p>
<p data-bbox="936 1305 1069 1437">1</p>	<p data-bbox="1386 1305 1519 1437">2</p>	<p data-bbox="1802 1305 1935 1437">3</p>	<p data-bbox="2219 1305 2352 1437">4</p>



Best Practices

- Start on time. End on time.
- Quickly review the agenda at the beginning.
- Put the goal (or primary problem to be solved) in a visible place.
- Watch for disturbances. Ask about fears and worries.
- Know what you'll say to keep the client focused and the session on track.
- Record strategy sessions so you (or the client) can revisit them later.

-
- “Let me put you on pause for a second.”
 - “You said we were here to talk about **OBJECTIVE**. I want to be sure that you get what you came for. Let’s icebox this for now, and if we have time at the end, we can return to it.”
 - “What I hear you saying is [fill in the blank].”
 - “Let me repeat back what I’ve heard....”



Your job is to help the client get clarity, confidence, and traction, your best tools are your own curiosity, empathy, and domain expertise. There are no magic questions I have that you don't. **Follow disturbances and excitement and connect those to the stated goal.**

Moving Target

The target can move before or during strategy sessions.

Here are 3 ways:

1. A client decides last-minute that the agreed upon outcome is no longer the outcome.
2. A client gets excited about your capabilities and starts peppering you with irrelevant questions, regaling you with irrelevant tales, and asking your advice on everything under the sun.
3. You get sucked in and start cataloging all of the client's problems.

You're not on the hook to find and fix all the clients problems. Your job to bring the client's attention (and the session's focus) back to the one need, problem, or opportunity the two parties agreed upon. **Your job is to help the client achieve one important business outcome. (Trust me, they'll thank you later.)**

Absolve yourself.

On rare occasions, it makes sense to torpedo your own agenda and go with the client's new priority. I can't give you perfect advice about knowing when to pivot, but I can give you this language for getting a verbal commitment on the session's new direction:

“What you want to focus on now is D, and not C that we agreed upon? You’re saying that using today’s session on D will be more valuable to you?”

You essentially make them take responsibility for torpedoing the agenda so that you absolve yourself of that responsibility.



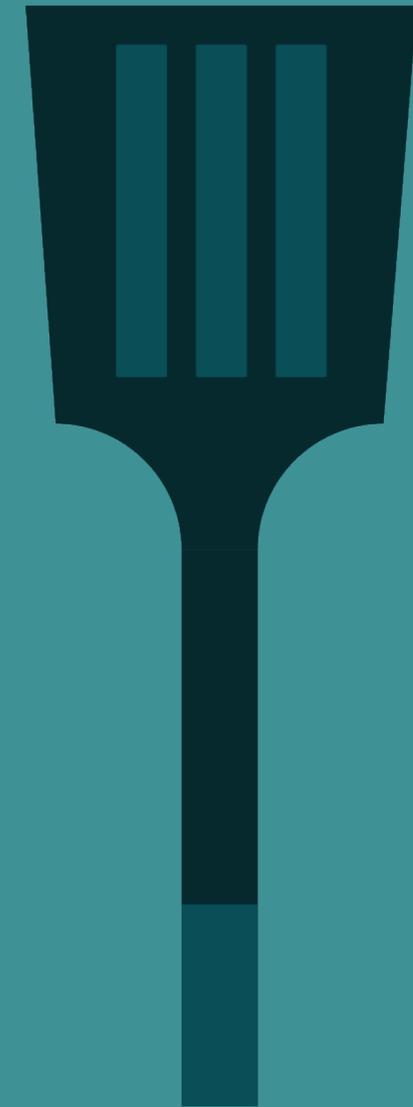
Three different personality types may try to hijack and lead the session to the detriment of the session:

1. Some clients are captains **accustomed to steering**. It's their default. If they sense you don't have control, they may try to take the wheel. When they prevent you from leading, they're hurting themselves. They make it harder for you to help them get clarity, confidence, and traction.
2. Some clients are passionate and **excitable** and want to riff on every interesting idea that comes up.
3. Some clients are very **talkative**. They will want to explain every aspect of the business as they they were singing a child's praises. Forty-five minutes in, you realize, "Wow, we haven't even finished the overview."

Client Hijackers

With all three personality types, you have to know in advance what you will say when a client gets distracted by shiny objects.

-
- “Let me put you on pause for a second.”
 - “You said we were here to talk about **OBJECTIVE**. I want to be sure that you get what you came for. Let’s icebox this for now, and if we have time at the end, we can return to it.”
 - “What I hear you saying is [fill in the blank].”
 - “Let me repeat back what I’ve heard....”



After the Session

- Send a thank you email detailing next steps.
- Draft your report ASAP.
- Deliver the report within 2-3 days.
- Follow up after 30 days, 60 days, 90 days.

Delivering Reports

FYI... You can use the Temi app (temi.com) to *write* the report content aloud.

Best Practices

- Let the copy *age* for 24 hours.
- Hire a designer to create a beautiful report template.
- Don't be afraid to be generous with a Bonus section or extra ideas you research on your own to add more detail or color.
- Deliver the report within 2-3 days.
- Follow up after 30 days, 60 days, 90 days.

At \$16 per hour and 20 hours per month, your bread-and-butter clients represents \$320 in gross monthly revenue for ETPCS. Now you have a sense of the opportunity cost of not ramping up your marketing:

- 10 new clients = \$3200/month; \$38,400
- 15 new clients/month = \$4800/month; \$57,600
- 20 new clients/month = \$6400/month; \$76,800
- And so on...

But in a more positive light, you can now place a value on consistent, effective marketing.

Why Wunderbar Is Best For The Project

Let's work together. Let's pursue the marketing opportunities you know about and proactively look for more.

Marketing is like budgeting: If it were easy, then everyone would do it. What we're really after is consistency. Not everything we try will work. But by running experiments on a regular basis and doing our best to track and measure results, we can zero in on the marketing opportunities that offer the highest ROI for ETPCS.

Most of Wunderbar's clients have hectic schedules. We can work around yours by doing a monthly 30-minute check-in—on Skype or Google Hangouts—to discuss progress and priorities. We can't coach players who don't show up to practice so it will be of critical importance for us to communicate on a regular basis and for you all to make decisions in a timely manner—within 72 hours.

The important thing is to do something different and expect different results:

- Monthly check-ins to discuss tactics and strategies
- Content calendar to drive our publishing schedule
- Monthly e-newsletters that send traffic to new blog posts
- Twice-monthly blog posts that educate clients and generate new leads
- Delegation of marketing tasks to us—e.g., calling the Chamber of Commerce to discuss options

- Better processes to make certain marketing and business development tasks more efficient—for example, free email “course” to educate new leads about what they need to look for in a personal care service

The goal is to do more of what's working and to stop spending money on dead-end “opportunities” with negligible ROI, regardless of what competitors are doing.

How We Can Do This For You

So the question is, how do we execute a comprehensive marketing plan consistently, ramp up ETPCS marketing, and achieve that ROI mentioned above—\$57,000 to \$76,000 over the next twelve months?

Typically, Wunderbar’s fully “done-for-you” engagements start at \$3,000 per month when the project ROI is \$75K+ within the first year. Because Caroline will be managing some of the marketing workload, \$2,250 per month makes more sense for ETPCS.

We like to pay off the full twelve-month engagement with the first batch of marketing initiatives, including re-marketing new services to existing clients, setting up host-beneficiary offers with strategic partners, and a streamlined referral request program.

And obviously, with new clients, a smart referral request program is the gift that keeps on giving. Clients gained this year and in Q1 2017 will bring in more clients in years to come.

With that said, which model best suits your needs?

Option A (Ongoing Marketing & Process Improvement) – \$2250 per month

We check in once a month to set priorities, and we knock out as many marketing tasks as possible within the 15 hours allotted per month.

For example, we use some of our time to work through the list above, and we can assist with blogging, setting up and sending email newsletters, writing and posting social media content, helping you all think through and execute on various opportunities, finding new opportunities, and designing and implementing business and marketing processes.

I would recommend starting with your sourcing, interviewing, and onboarding process.

Option B (One-Off Marketing Projects) – \$3500 per 20 hours

For teams who are looking for more of an advisor and who plan on doing much of the implementation work themselves, we offer a one-off option in the form of a block of hours—\$3500 for 20 hours.

We can assist in further developing your marketing strategy, implementing some pieces of it ourselves, and assigning other tasks and activities to your admin staff or team members.

What Happens Next

I'd like to get started on this immediately so that we can gain traction before the holiday rush and position ourselves to hit the ground running in January. If we can knock out some of the smaller projects now, then a January "launch" will be even more successful.

To get started, I simply need a "Yes" from you. I will then create a Client Service Agreement detailing our engagement and will send it over for your review.

The deposit required is either the first month's \$2250 or \$3500 for the block of 20 hours.



How, When, Where to Pitch Additional Services



- Be sure to **ask about their budget** for going after the problem, need, opportunity during the session.
- If you like the client, **include 2-3 options for ongoing collaboration** in your report's "What's next?" or "Where do we go from here?" Section.
- You can also **include a Check-In Call in the strategy engagement**. Two weeks later, you ask, "How is everything going?" Then, you offer to help.
- **Keep in touch.**

Closing Thoughts

Remember...

It took me around 6 months to
sell my first strategy offer.

You can do better than that, right?!



Mind your mindset.

1. Take messy, imperfect action.
2. Depersonalize the outcome.
3. Pay attention to what wants to happen.
4. Iterate over time.
5. One data point is not a trend.
6. Raise the price because price is perceived value.
7. When a client pushes back on price, shrink the scope.
8. Be patient.

Further Reading

The Business of Expertise by David C. Baker

Million Dollar Consulting by Alan Weiss

The Charisma Myth by Olivia Fox Cabane

The Coaching Habit by Michael Bungay Stanier

Get it to cash.

1. Pick your starter strategy flavor—i.e., the one easiest for you.
2. Write the crappy first draft of your juicy offer.
3. Finalize your structure, including premium client experience, facilitation, and report delivery.
4. Gather your initial set of questions.
5. List stuff you still need to deliver this engagement.
6. Assign specific tasks to specific days in your calendar.
7. Pursue opportunities you already have with past / existing clients or in a new niche.
8. Brainstorm 10 people.
9. Email them to ask for 5 minutes of their time.
10. Get feedback on your offer and iterate, as needed.
11. Close 1 person if you can.
12. Set your sales process into motion.



Monetize Your Advice

Q&A

Ed Gandia & Austin L. Church



Thank you!

