



Monetize Your Advice

Workshop - Day 2

Ed Gandia & Austin L. Church



What does “offer” mean?

An offer is a service or group of services you package up as a desired outcome or transformation with a fixed price, fixed scope, clear benefits, and delivery date.



What is a “juicy offer”?



Copy this worksheet.



<https://bit.ly/MYAOfferWorksheet>



7 Parts of a Juicy Offer

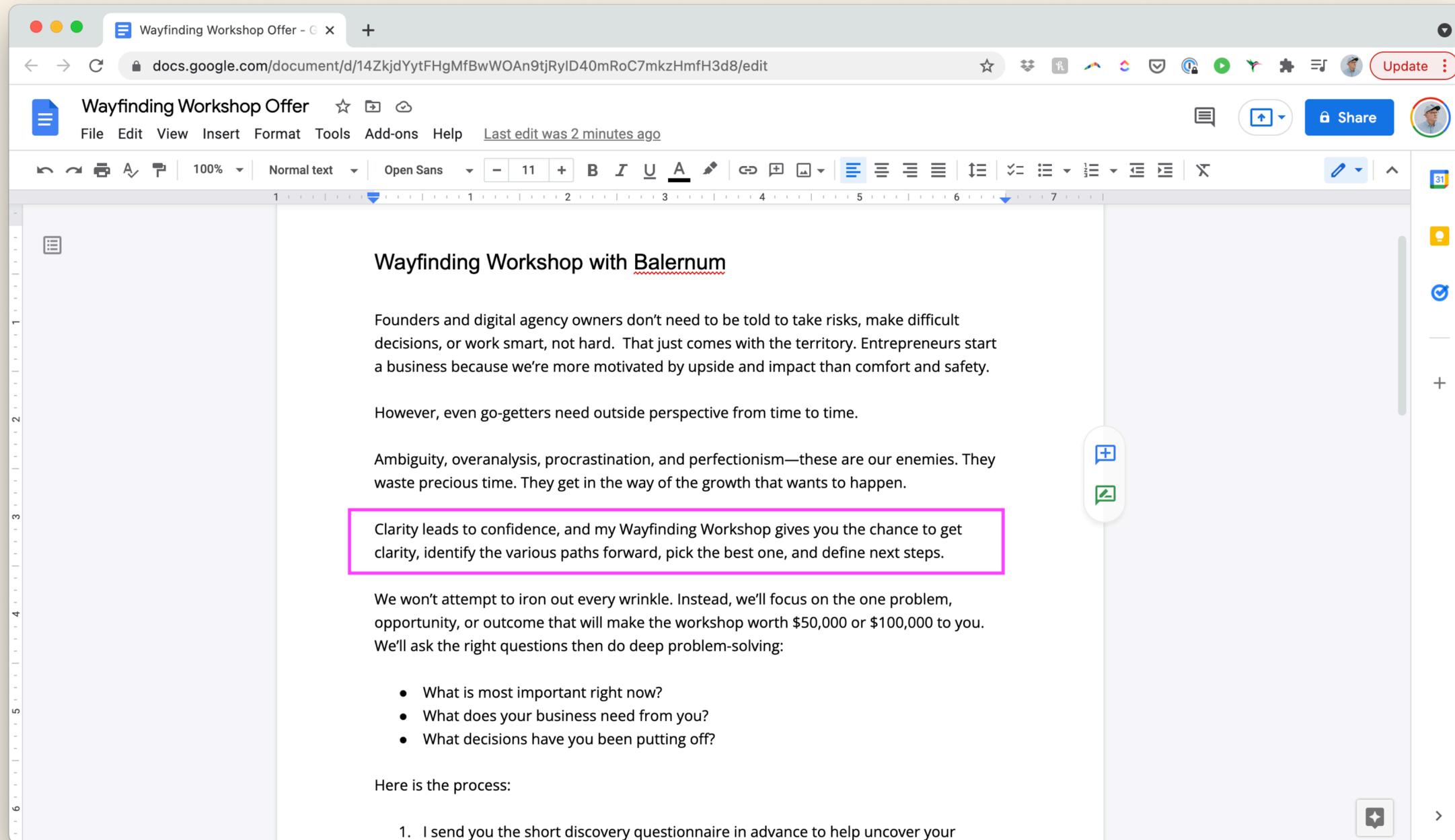
1. **Promise**
2. Value
3. Risks
4. Outcomes
5. Process
6. Price
7. Proof

Make a bold promise.

What will be different and better for the client afterward?

Think about the client's single biggest challenge, opportunity, or need, and encapsulate their desired change in a single sentence.

Example: "Give me 2 hours with your email marketing setup and I will find the gremlins and opportunities that other SaaS founders miss. I'll then tell you exactly what you need to do to see better results in the next 30 days."



The screenshot shows a Google Docs interface with the following content:

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

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Quantify the value.

Why is this engagement worth more than the client will spend?

We default to thinking about dollars-and-cents ROI, but the value of what our clients get is much bigger than that: clarity, confidence, renewed passion or sense of purpose, speed, risks avoided, relief, and efficiency.

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Explain the risks.

What should clients watch out for?

You're more aware of the risks than most clients. They'll try to achieve the goal or solve the problem without realizing their methods are outdated, ineffective, or incomplete. You can show your expertise by calling out some of the most common mistakes. This differentiates yourself and earns trust.

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Identify key outcomes.

What does the client get? What will be different? What is the before and after?

Outcomes can include deliverables, such as an actionable plan, and emotional benefits, such as clarity, peace of mind, or confidence.

Use short, declarative sentences that get straight to the point and leave no ambiguity:

“By the end of the project, you will have...”

“Here’s what you will get...”

“Within 30 days, I will...”

“You will get...”

6. I deliver your plan of attack. After the two sessions, I turn all the notes, ideas, and decisions into a well-organized, well-defined plan within a couple of days.

Cost – \$3,500 paid up front

Key Outcomes

- Clarity and the confidence it brings
- Momentum and the excitement it brings
- A clear, actionable plan

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Outline the process.

How does this project unfold?

By sharing 3 to 7 important steps, you help clients better understand what they're signing up for.

Go back and look at your key outcomes and ask yourself, "What steps are necessary to get to those outcomes?"
Voila. There's your process.

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."*

3. We schedule the 3-hour workshop, divided into two 90-minute sessions. You're welcome to come to Knoxville for an in-person workshop, or we can handle it on Zoom. The coffee and pastries are better in person though. ☺
4. We focus the first 90-minute session on high-level consulting and strategy. What question are you trying to answer? What's the real challenge here?
5. We focus the second 90-minute session on planning and tactics. What are the various paths forward? Which one is cheapest, most expedient, or most attractive overall? What are the discrete action steps in that path?
6. I deliver your plan of attack. After the two sessions, I turn all the notes, ideas, and decisions into a well-organized, well-defined plan within a couple of days.

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Add some proof.

How can you reinforce your credibility?

Proof is a crucial part of your offers because it makes it easier for your clients to believe and trust you. You can leverage three types of proof: proof of path, proof of capability, and proof of results.

- Momentum and the excitement it brings
- A clear, actionable plan

“We needed to get clear on the processes and systems that will enable Legacy Podcasting to scale from \$60K a month to \$100K a month. At the Wayfinding Workshop we gained real clarity on the steps we must take to systematize our business so that I (Ryan) can step away from 95% of the day-to-day stuff and focus on high-profile clients and other projects. Austin has a great deal of experience in the agency world, and I was able to tap into that to ask very specific questions that can help our 2-year-old agency make some real leaps in knowledge and forward momentum. I was also able to tap into the resource library that Austin has amassed over the years. Austin knows how to ask the right questions to get to the core of the issue and get you to what needs to happen to rectify that. On top of that, he was just a solid guy with a great personality to match.”

– Ryan Helms, Founder, Legacy Podcasting

(Check out the video Ryan made [here](#).)



“Have a bias towards action – let’s see something happen now. You can **break that big plan into small steps** and take the first step right away.”



Indira Gandhi

Former Prime Minister of India



“Strategic planning has a positive, moderate, and significant impact on organizational performance in the private and public sectors, across international settings.”

PAR PUBLIC ADMINISTRATION REVIEW Check for updates

Bert George
Ghent University, and Erasmus University Rotterdam

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Joost Monster
Focus Orange

Research Article

Does Strategic Planning Improve Organizational Performance? A Meta-Analysis

Abstract: Strategic planning is a widely adopted management approach in contemporary organizations. Underlying its popularity is the assumption that it is a successful practice in public and private organizations that has positive consequences for organizational performance. Nonetheless, strategic planning has been criticized for being overly rational and for inhibiting strategic thinking. This article undertakes a meta-analysis of 87 correlations from 31 empirical studies and asks, Does strategic planning improve organizational performance? A random-effects meta-analysis reveals that strategic planning has a positive, moderate, and significant impact on organizational performance. Meta-regression analysis suggests that the positive impact of strategic planning on organizational performance is strongest when performance is measured as effectiveness and when strategic planning is measured as formal strategic planning. This impact holds across sectors (private and public) and countries (U.S. and non-U.S. contexts). Implications for public administration theory, research, and practice are discussed in the conclusion.

Evidence for Practice

- Strategic planning has a positive, moderate, and significant impact on organizational performance in the private and public sectors, across international settings.
- The findings suggest that strategic planning should be part of the standard managerial approaches in contemporary organizations and contradict many of the critiques of strategic planning.
- The formality of the strategic planning processes (i.e., the extent to which strategic planning includes internal and external analyses and the formulation of goals, strategies, and plans) is important to enhancing organizational performance.
- Strategic planning is particularly potent in enhancing organizational effectiveness (i.e., whether organizations successfully achieve their goals), but it should not necessarily be undertaken in the hope of achieving efficiency gains.

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Strategic planning (SP) is one of the more popular management approaches in contemporary organizations, and it is consistently ranked among the five most popular managerial approaches worldwide (Rigby and Bilodeau 2013; Wolf and Floyd 2017). Typically operationalized as an approach to strategy formulation, SP includes elements such as analysis of the organization's mandate, mission, and values; analysis of the organization's internal and external environment; and identification of strategic issues based on these analyses and the formulation of strategies, goals, and plans to address the issues (Bryson 2011). Based on arguments drawn from the Harvard policy model (Andrews 1980), synoptic planning theory (Dror 1983), and goal-setting theory (Locke and Latham 2002), SP can be expected to positively contribute to organizational performance (OP). The Harvard policy model implies that organizational strategies should be geared toward finding a fit between the organization and its environment (Andrews 1980). Synoptic planning theory argues that strategic decisions should be grounded in thorough analysis and a systematic approach to decision-making (Dror 1983). And goal-setting theory argues that concrete goals, strategies, and plans should be devised to understand what an organization wants to achieve and how (Locke and Latham 2002). SP ideally offers an approach to strategy formulation that includes procedures, tools, and practices geared toward incorporating these theoretical arguments during strategy formulation—although it should be noted that much variation exists in how organizations “do” SP (Bryson, Edwards, and Van Slyke 2018; Ferlie and Ongaro 2015). The popularity of SP seemingly offers credence to the idea that it contributes to OP. After all, why would SP be so popular if practitioners believed it did not provide any benefits? SP's prominence in the public sector grew apace from the 1980s onward (George and Desmidt 2014).

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Public Administration Review

Even More Boring Than It Sounds

Offer

Pick the offer type.

What's the nature of the work you'll be doing?

Diagnostic → Looking for problems and opportunities.
Example: SEO Audit

Strategic → Helping clients decide how they'll meet goals
Example: Content Strategy

Planning → Defining the steps from Point A to Point K
Example: Marketing Plan

Choose Your Own Adventure → Deciding what needs to be done, how to do it, and perhaps even doing it
Example: Project Roadmapping



bit.ly/47C6s6Q

Pick your audience.

To whom are you selling this offer?

By zeroing in on a specific audience—better yet, a real person in that audience—you'll have an easier time thinking through their problems, pain points associated with those problems, and desired outcomes.

Set a timeframe.

Will delivering the outcomes take you one hour, one day, or one week?

Keep the timeframe on the shorter side so that you're helping the client get relatively quick insights and quick wins. Your strategy offer will position you to sell your signature offer to the right clients.

Choose a delivery mechanism.

Will you be doing a coaching call, strategy session, workshop, sprint, or live training? Will you gather insights on your own, share them in a video call, and close with recommendations?

Think through the most effective way to do the work and create a valuable, satisfying experience for the client.

Define the workflow.

What is everything you need to do, beginning to end?

Think through the container, or main piece of work, required to deliver the outcomes, as well as other discrete tasks, such as sending a questionnaire, pulling reports, doing competitive analysis, interviewing stakeholders, or running through a diagnostic checklist.

**Pick the deliverable,
if needed.**

What will you give to the client?

One-off strategy sessions may not have a deliverable, except for the session itself, but other strategy engagements may culminate in a written plan, report, recap, roadmap, or slide deck.

Map out the client experience.

What will make the engagement more valuable, meaningful, and memorable for clients?

Depending on how you do the work, you can increase the perceived value through beautiful design, lunch or snacks, strong communication, surprises, freebies, and engineered wow moments.

Name it.

What are you going to call this offer?

Giving something a name makes it more significant, and when in doubt, name the offer after the single most valuable outcome.

You can take several different approaches with the name:

Focus on the process—for example, Audit, Analysis, Deep Dive, Evaluation, Diagnostic, Investigation, Examination, Checkup, Tuneup, Reboot, Refresh, Review, or Overhaul.

Focus on the outcome—for example, Smart Growth Plan, Brand Beautified, Clarity Session, Homepage Blueprint, or Custom Business Roadmap

Use a metaphor—for example, Alarm Clock (waking up), Cleanse (getting out the bad stuff), Makeover (making it prettier), CPR (bringing it back to life), Firestarter (starting something exciting), Idea Bounce, or Wayfinding Workshop.

Nail down messaging.

What is the client thinking, feeling, and doing now, and what will they be thinking, feeling, and doing after the engagement?

By communicating both their current state and future state, you position yourself as an authority and paint a picture of the desired transformation.

**Brainstorm key
differentiators.**

What are 3-5 key differentiators that enable you to do this kind of work better than most?

Look beyond your creative and problem-solving skills and consider what else enables you to deliver key outcomes and create value for your clients—for example, your unusual background, specialized knowledge, character and personality traits, network, or methodology and tools.

Name your price.

What amount of money would you feel great about making for this amount of work?

At the very least, think about how much you want to make per hour, multiply that times the number of hours you expect to invest in the engagement, and add an extra 20%.

Pricing

Pricing

Dream Rate x Hours x 1.2 (or, 20% cushion) = Price

(or)

What amount of money would you feel great about making for that amount of work?

(or)

Value-Based Price → Dream Rate x Hours x 2 to 5x

Dedicated Worktime