



Session 4

Marketing & Selling Strategy

Austin L. Church



Session 3 Recap

- Which flavor would be **easiest for you to pursue** right away? Pick that one, knowing that it's okay for the lines between different strategy flavors to get blurry.
- You **don't have to become a consultant overnight** and invent your own methodology. **Use someone else's tools.**
- The value in selling and delivering strategy engagements is 1) **creating space**, 2) **asking good questions** tied to an agenda and specific outcome, and 3) **turning the mess of notes into a clear, actionable plan.**

What We'll Cover

- Marketing
- Selling

Marketing

Remember...

Strategy clients aren't waiting for you to fail. Your job is not to prove yourself a genius but to facilitate a process of self-discovery for your client.

Right-size your marketing.

- Pick the easiest strategy flavor.
- Finish packaging up your strategy offer.
- Set a price you feel good about.
- Put the offer in front of 10 people.
- Set a goal to **sell 1 strategy session in the next 6 weeks.**

**By “easiest” strategy flavor,
I mean...**

- Feels doable based on the confidence you already have
- Uses the aptitudes, knowledge, and skills you already have
- Meets a need for clients you already have (or could get)
- Works with the expertise you already (supplemented by process & tools in this program)

Finish packaging up your strategy offer.

- Pick a niche (more on that in a moment).
- Pick the key outcome—e.g., content roadmap.
- Think back on past projects and list the questions that need to be answered for the client to get clarity.
- Turn the client's obstacles and outcome into a promise.
- Spend 5 minutes thinking through 5-8 steps of the process you'll use in the session.
- Set a price you feel good about.
- Name the thing.
- **In other words, use the Juicy Offers framework.**

Flavor + Niche

Example: Content Roadmapping + SaaS Founders

What should you call it?

"Call" (< 30 min)

"Session" (60-90 min)

"Workshop" (> 90 min)

"Sprint" (> 3 hrs)

Idea Bounce

[insert cutesy name here]

"24 of Your Best Posts in 60
Minutes"

[desired outcome]



Name

"24 of Your Best Posts in 60 Minutes"

Content Roadmapping for SaaS Founders

“24 of Your Best Posts in 60 Minutes”

We will identify and organize 24 of your best ideas for thought leadership articles. We'll outline the first 3. By the end of our session, you'll know exactly what to write for the next 6 months. No more second-guessing, writer's block, or wasted time.

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 2-5

Content Roadmapping for SaaS Founders

"24 of Your Best Posts in 60 Minutes"

We will identify and organize 24 of your best ideas for thought leadership articles. We'll outline the first 3. By the end of our session, you'll know exactly what to write for the next 6 months. No more second-guessing, writer's block, or wasted time.

\$500

Language to Use

What the offer is (esp. what problem it solves)

Who it's for → your right-fit client who gets the best results with you

What they tried before (that didn't work)

What the offer helps them achieve (i.e., key outcomes)

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."

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.

What do clients get when they buy strategy?

Space

Clarity

Objectivity

Expertise

Confidence

Organization

Direction

Traction (i.e., Actionable Plan)

"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.**

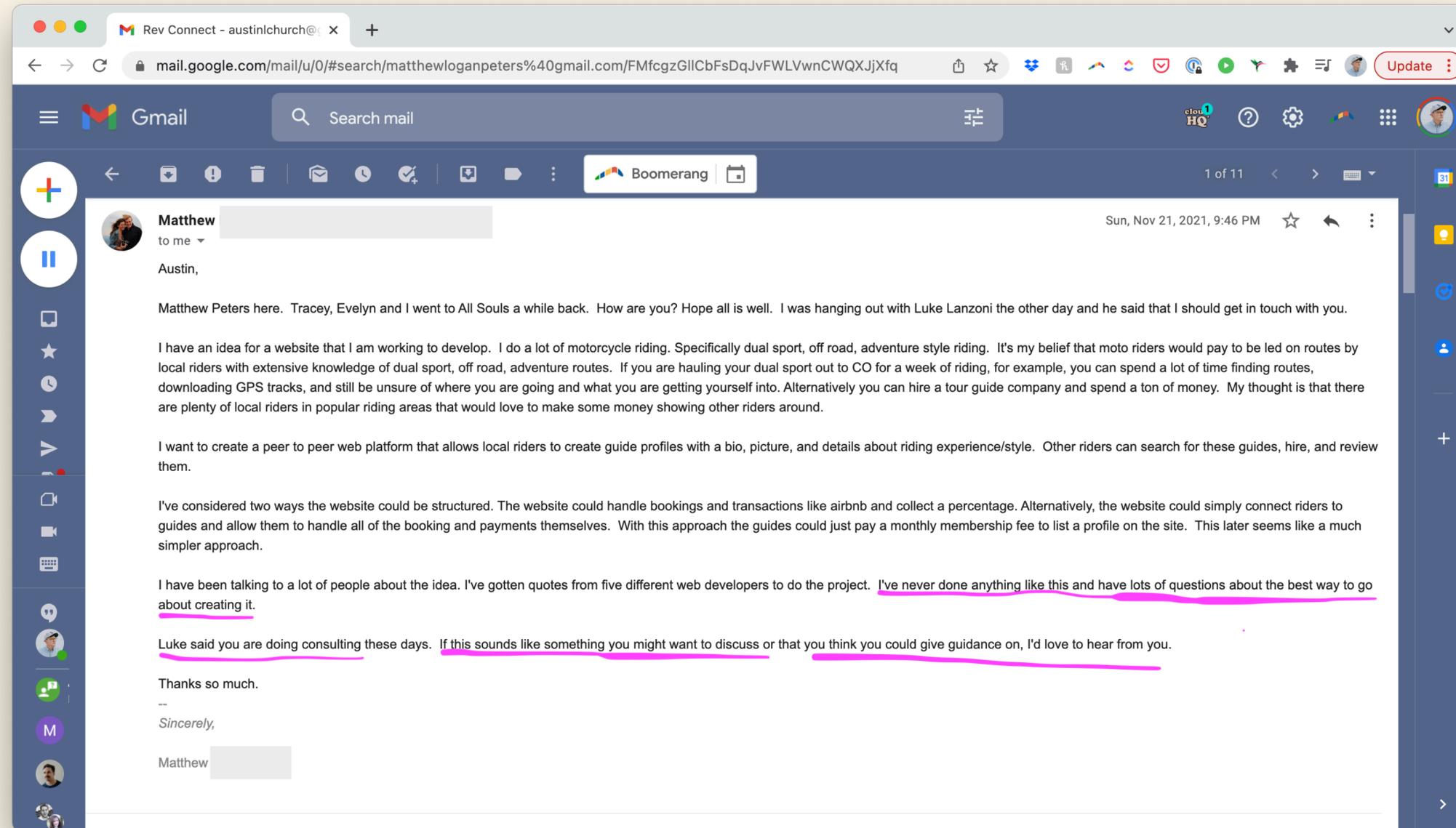
Roadmapping Sessions are typically **for people who know they need help with business development or branding but aren't quite sure where to put their focus.** The cost is a flat \$1,500 for the work session and deliverable, and the **deliverable is a clear roadmap for moving forward with confidence.** You can read more about the rationale behind Roadmapping here: [link]."

Who values what you know?

- Easiest Ways to Get Started
- Best Practices
- Best Tools, Resources, Principles
- Tricks of the Trade
- Common Pitfalls, Mistakes, Dead-End Advice
- Workflow & Productivity Hacks
- Things to Try

3 Buckets of Opportunities

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



Friends, Family, Colleagues

 **Austin Church** <austin@wunderbarworks.com>
to Darin ▾

Thu, Feb 11, 2016, 2:53 PM ☆ ↩ ⋮

Hi Darin,
Thanks for reaching out. I love the vision of what you're doing. I've got two kids myself, and man, if there's one thing I want to "do right," it's them. But then again, they belong to God, not me, so they're not a project. My wife Megan and I heard pretty clearly about that from the beginning. We'll always have a village to help rear our kids when she and I fall short. So the pressure is off!

Anyway, you're wanting specific advice about the bullet points you listed?

I think the thing to do next would be for you to buy me lunch. I typically charge \$500 for a Clarity Session, but let's start with breaking bread. You can tell me a bit more about your goals, and I can share my perspective.

If that sounds good to you, then name a few days the week after next.

Austin
⋮
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Best,
Austin L. Church

Take the no-pressure approach.

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."

3 Buckets of Opportunities

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



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.

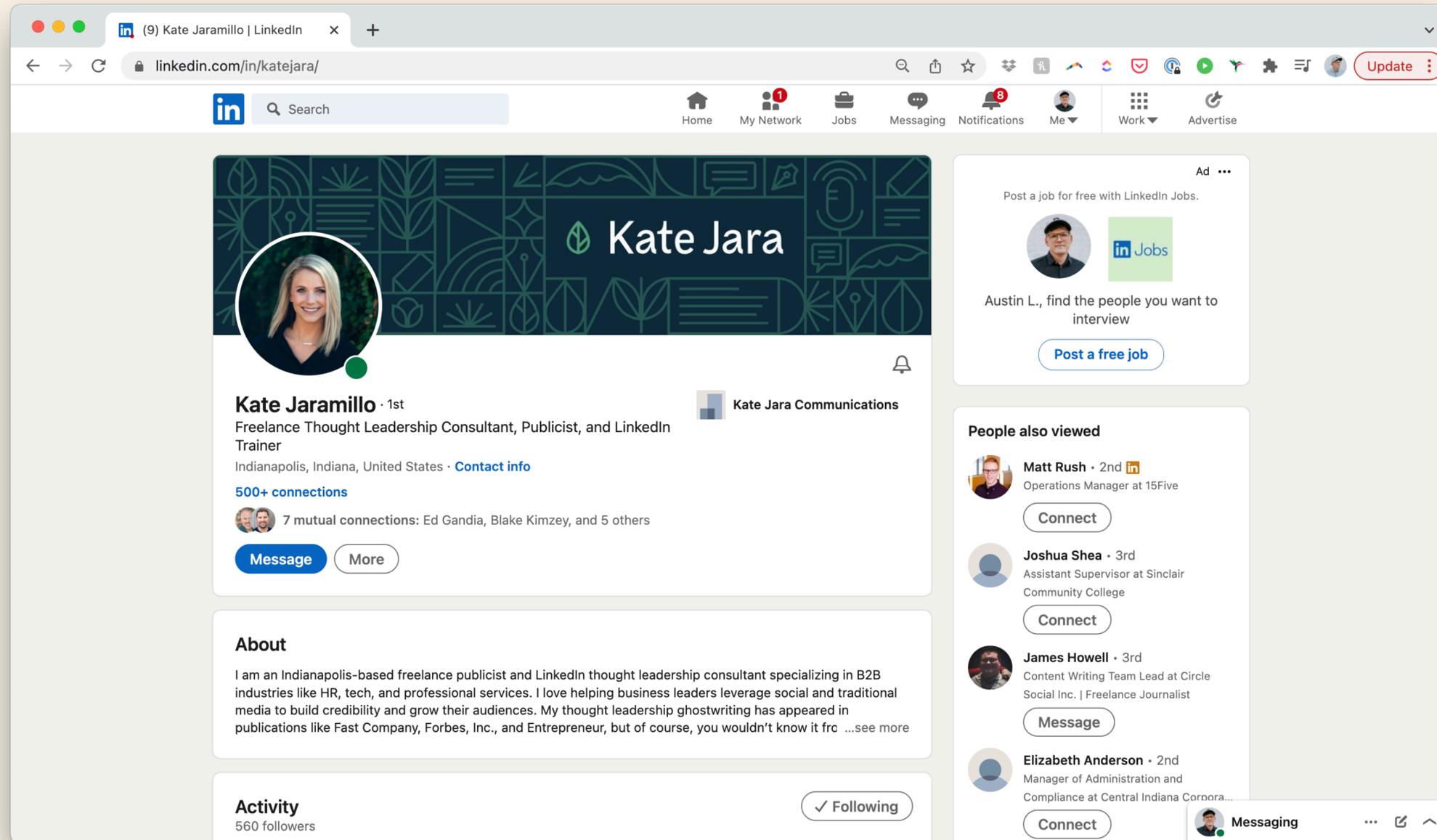
How about next Tuesday afternoon? That will give you Monday to get back in the saddle. If that works for you, you can [use this link to book it.](#) I typically charge \$500 for these 90-minute roadmapping sessions. Our goal is to develop the plan that we'll work from for the next 6-12 months.

Austin

Niche You Already Have

3 Buckets of Opportunities

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



The screenshot shows a LinkedIn profile for Kate Jaramillo. The browser address bar indicates the URL is linkedin.com/in/katejara/. The profile header features a dark blue background with a pattern of icons and the name "Kate Jara" in white. Below the header is a circular profile picture of a woman with blonde hair. The profile information includes the name "Kate Jaramillo · 1st", the title "Freelance Thought Leadership Consultant, Publicist, and LinkedIn Trainer", and the location "Indianapolis, Indiana, United States · Contact info". It also shows "500+ connections" and "7 mutual connections: Ed Gandia, Blake Kimzey, and 5 others". There are "Message" and "More" buttons. The "About" section contains a paragraph: "I am an Indianapolis-based freelance publicist and LinkedIn thought leadership consultant specializing in B2B industries like HR, tech, and professional services. I love helping business leaders leverage social and traditional media to build credibility and grow their audiences. My thought leadership ghostwriting has appeared in publications like Fast Company, Forbes, Inc., and Entrepreneur, but of course, you wouldn't know it fro ...see more". The "Activity" section shows "560 followers" and a "Following" button. On the right side, there is an advertisement for LinkedIn Jobs with a "Post a free job" button. Below the ad is a "People also viewed" section listing three profiles: Matt Rush (Operations Manager at 15Five), Joshua Shea (Assistant Supervisor at Sinclair Community College), and James Howell (Content Writing Team Lead at Circle Social Inc. | Freelance Journalist). At the bottom right, there is a "Messaging" button.

Niche You Want to Try

Test the offer to see if...

- People will buy it.
- It's relatively easy to sell.
- It gives you a high "effective" rate (or, return on time).
- You actually enjoy it.

Selling

Sales Schmales

Proven Offer (what it is, what it does, who it's for)

Right-Fit Client (who gets the best results with you)

Simple Tracking System (e.g., GSheet)

Sales Process (how you generate leads, how you build trust, how you close deals)

Key Numbers (# of conversations, # of yeses)

Ways to Deliver Offers

- Sales Deck
- Web Page
- GDoc
- Boilerplate Description for Emails

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

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

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 Posts 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."

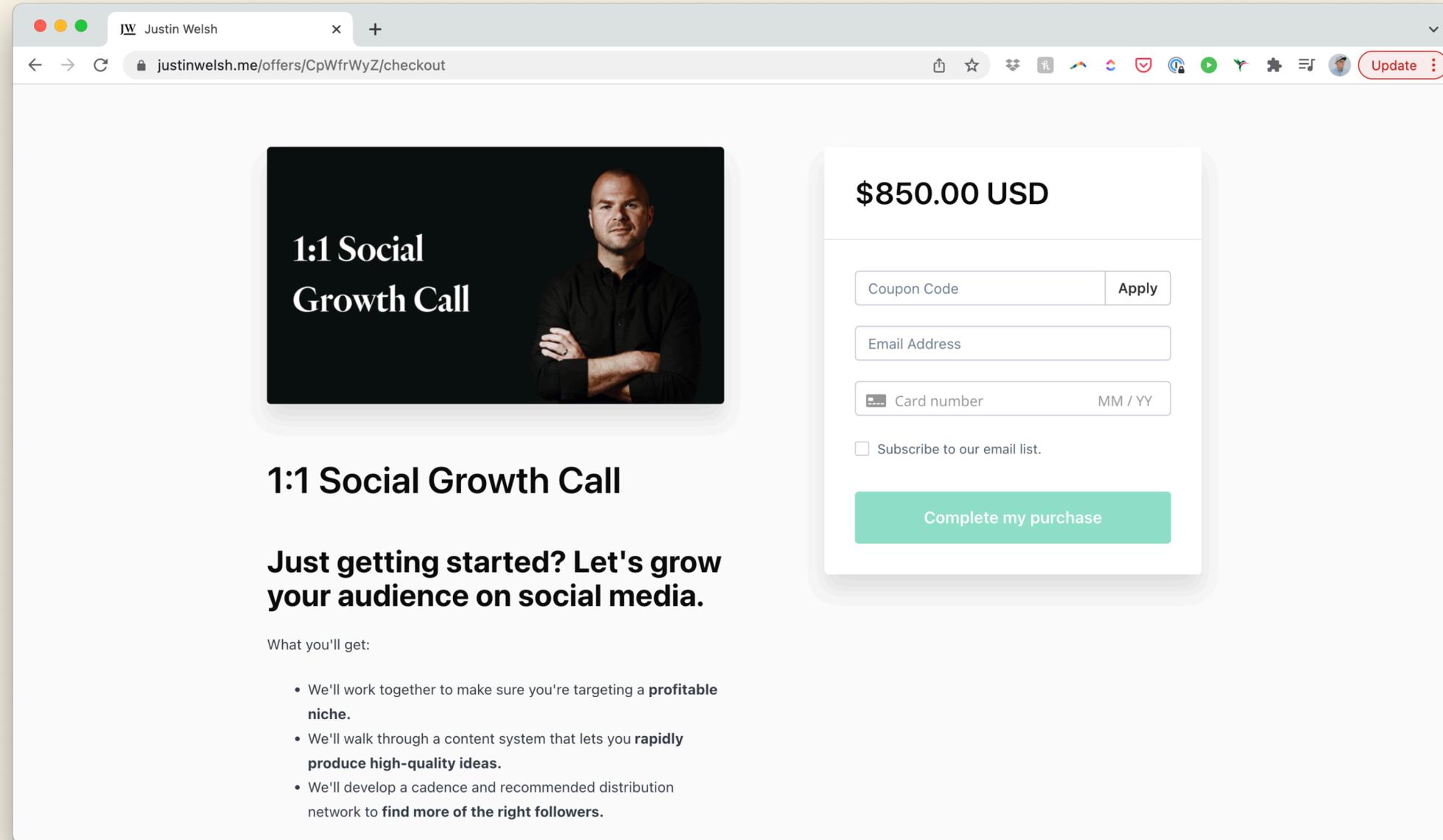
Brainstorm a list of 10 people in your target audience you already know. (Be sure to check your LinkedIn connections.)

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.



The screenshot shows a Carrd checkout page for a '1:1 Social Growth Call'. The page is displayed in a browser window with the URL `justinwelsh.me/offers/CpWfrWyZ/checkout`. The main content area features a dark image of a man with his arms crossed, overlaid with the text '1:1 Social Growth Call'. Below the image, the heading '1:1 Social Growth Call' is followed by the sub-heading 'Just getting started? Let's grow your audience on social media.' and a list of benefits under the heading 'What you'll get:'. The checkout form on the right includes a price of '\$850.00 USD', a coupon code field with an 'Apply' button, an email address field, a card number field with a 'MM / YY' format indicator, a checkbox for 'Subscribe to our email list.', and a green 'Complete my purchase' button.

1:1 Social Growth Call

Just getting started? Let's grow your audience on social media.

What you'll get:

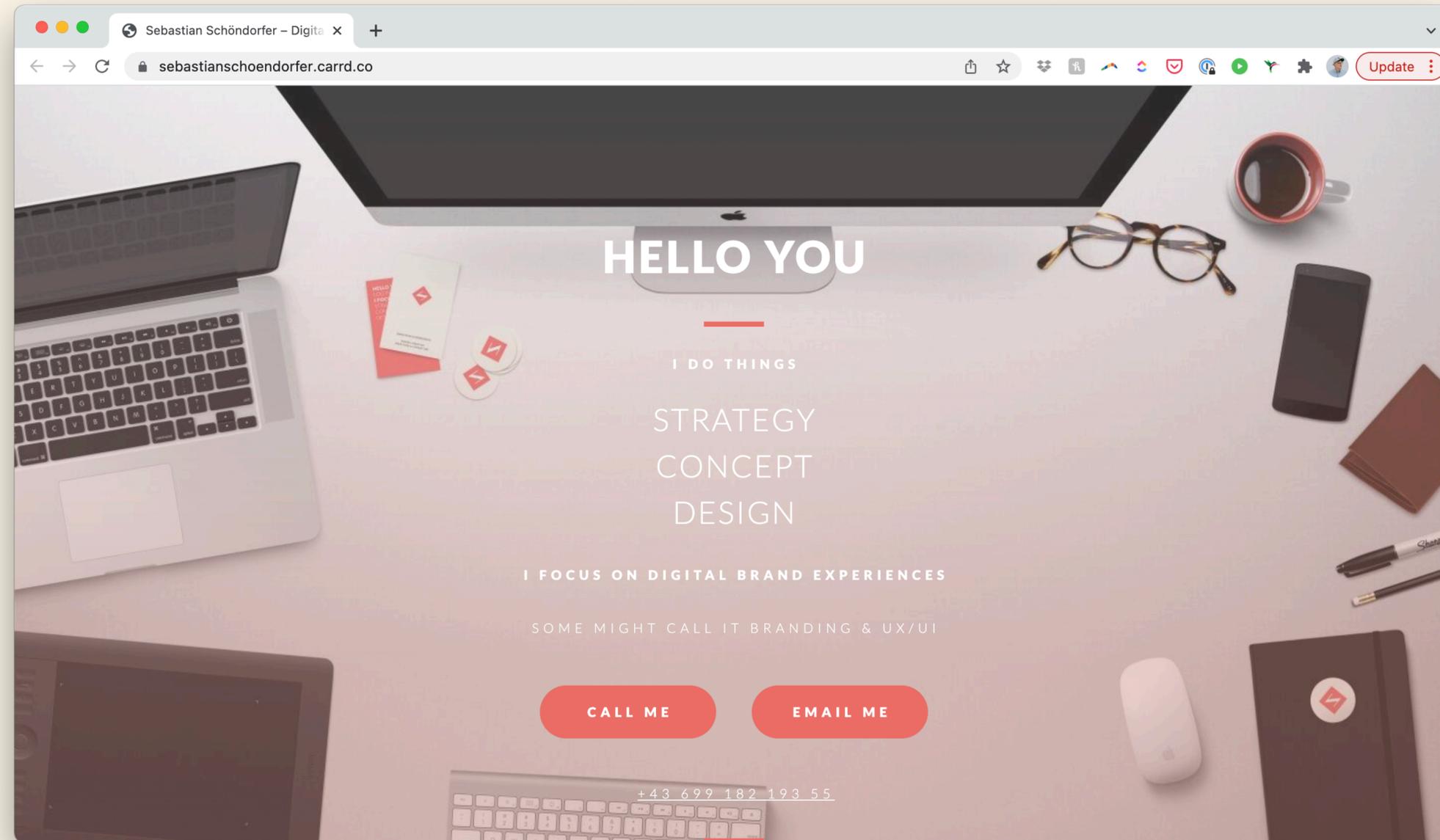
- We'll work together to make sure you're targeting a **profitable niche**.
- We'll walk through a content system that lets you **rapidly produce high-quality ideas**.
- We'll develop a cadence and recommended distribution network to **find more of the right followers**.

\$850.00 USD

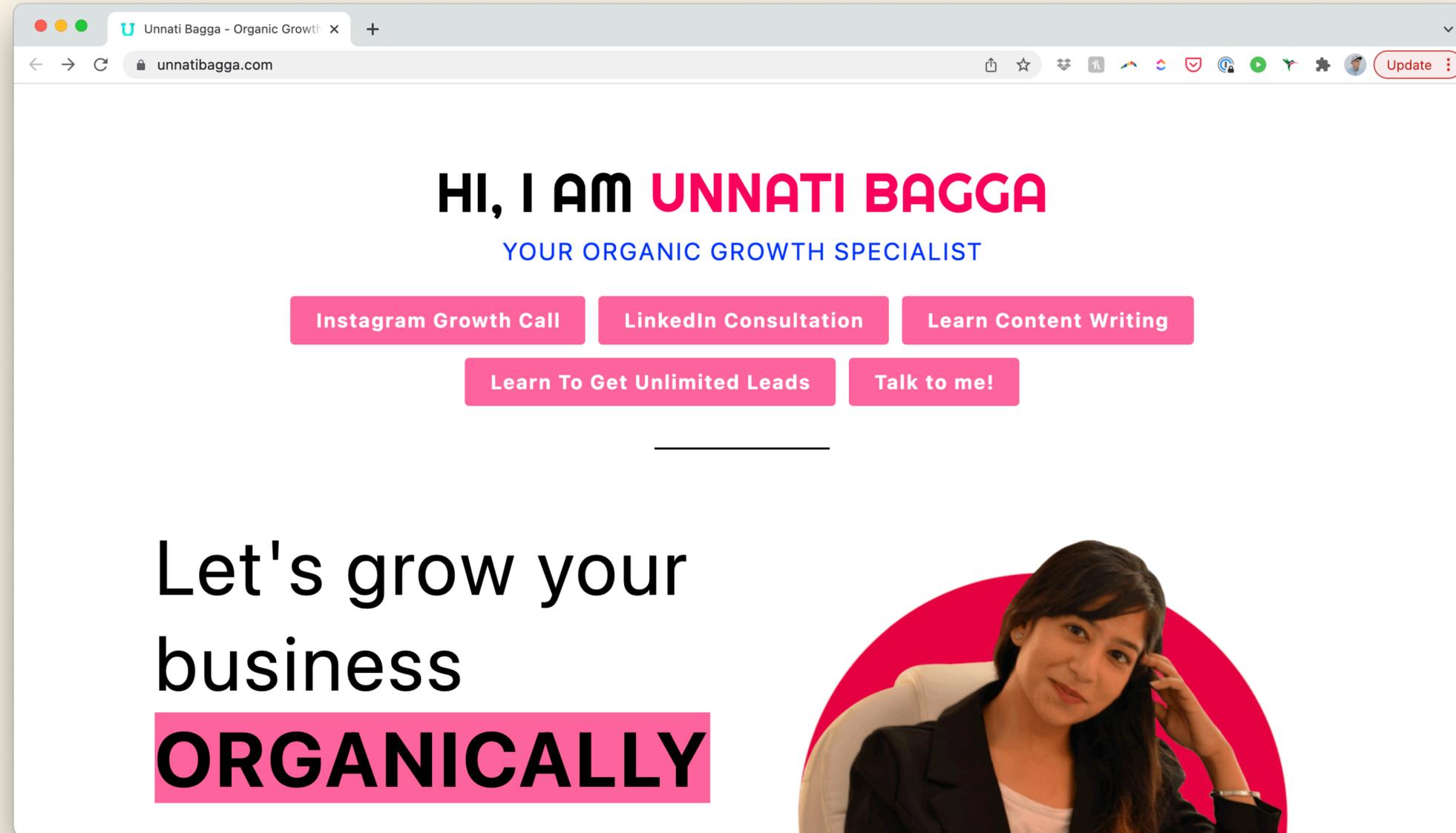
Coupon Code

Email Address

Subscribe to our email list.



Carrd Website Example



Carrd Website Example

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.

Optional: Set up a 1-page Carrd or Jolly website for your offer and accept payments. Or, pay to use the Calendly paywall.

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."

Steps for You

1. Share the offer and get the yes.
 2. Send the invoice and questionnaire.
 3. Once the client pays the invoice, you schedule the session.
 4. Use client's answers to create agenda.
 5. Ask open-ended questions and take notes.
 6. Define the problems and available solutions.
 7. Repeat back what you have heard—often.
 8. Turn your notes into an actionable plan, and deliver it within 2-3 days.
- Optional** – If you like the client, include 2-3 options for ongoing collaboration in your report—i.e., the next step up on your value ladder.

**Let's take it one
step at a time.**

- Finalize your juicy offer.
- Brainstorm 10 people.
- Ask for 5 minutes of their time and get feedback on your offer.
- Iterate.
- Close 1 person if you can.
- Set your sales process into motion.

What Upcoming Sessions Cover

Session 5 – Leading Effective Strategy Sessions

Session 6 – Avoiding Pitfalls + Getting Started

Session 4

Assignment

1. Pursue the opportunities you already have.

Take a look at your client list from the past 2 years. Could any of them be candidates for your new strategy offer?

2. Take another look at your target audience or dream client profile.

Would you find it easier to sell strategy if you doubled down on your existing niche or totally new one?