



# Session 5

Leading Effective  
Strategy Sessions

**Austin L. Church**



---

## Session 4 Recap

- 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 We'll Cover

- Facilitating Sessions
- Delivering Reports
- Example

---

# Facilitating Sessions



We lead our clients happens **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.

---

---

## Before the Session

Share the offer and get the yes.

Send the invoice.

Schedule the session (after the client pays the invoice).

Send the pre-work questionnaire.

Review the client's responses.

Confirm the goal with the client.

Use responses and any follow-up or clarifying questions to create agenda.

Zero in on the root problem, need, or opportunity.

---

## 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.



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.

---

---

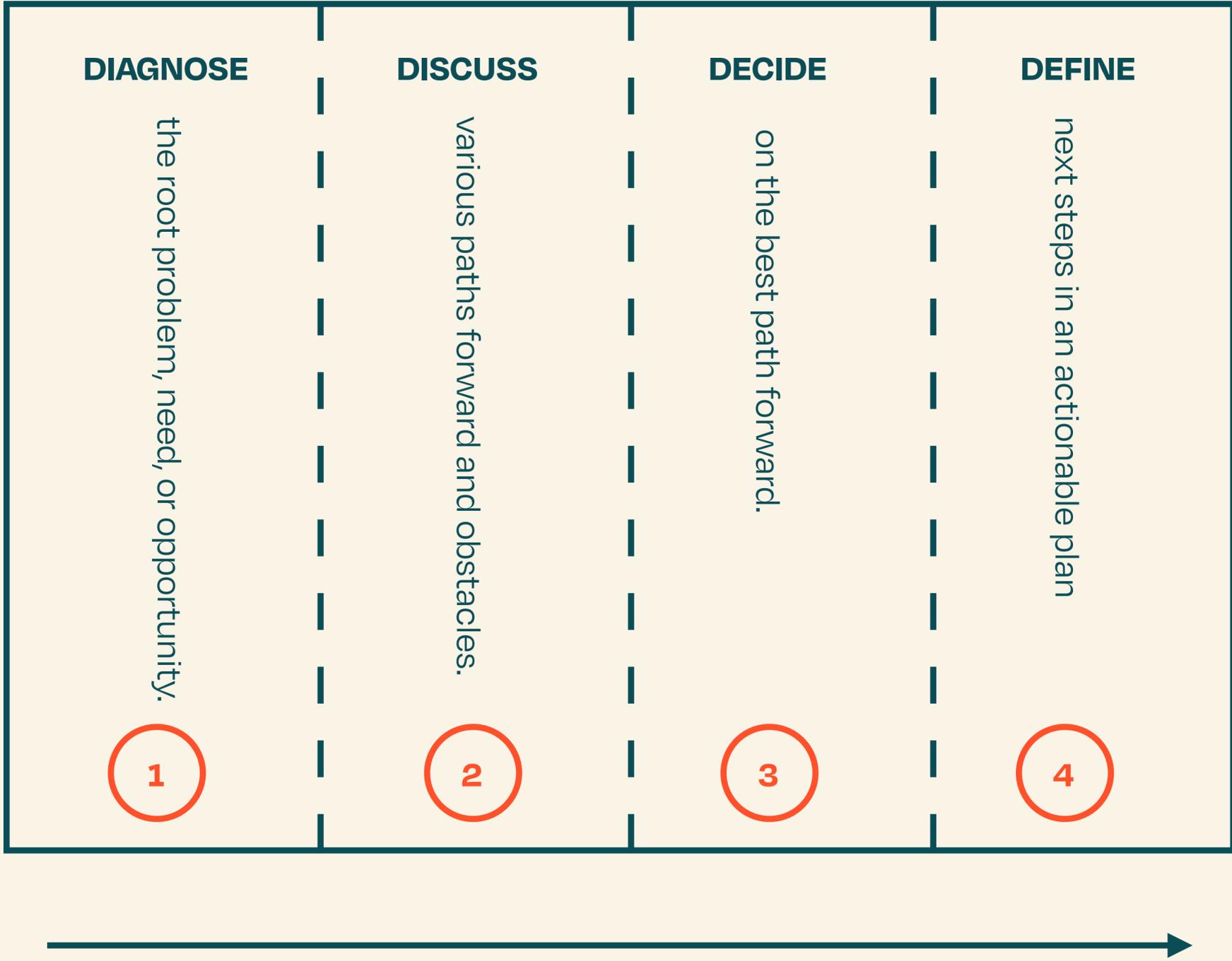
## During the Session

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.**



<b>DIAGNOSE</b>	<b>DISCUSS</b>	<b>DECIDE</b>	<b>DEFINE</b>
<p>"Let's restate why we're here...."</p>	<p>"You already tried Z. What were the results?"</p>	<p>"What I hear you saying is that P is the best path forward?"</p>	<p>"It seems like the first step is C. Would you agree?"</p>
<p>"Okay, so if we got clarity and came up with a plan for X, then you'd leave satisfied?"</p>	<p>"You're interested in A, but clearly something has held you back. Let's dig into that."</p>	<p>"Let's talk through the blockers, needs, and tasks."</p>	<p>"Before you can E, you have to D, right?"</p>
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>



---

## 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.

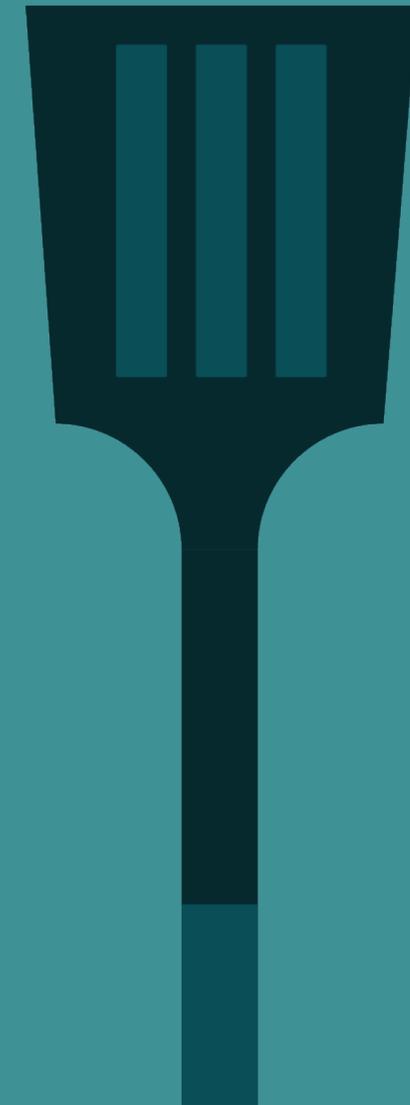
**5 Minutes** → Wrap up and explain next steps.

---

## 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.**

---

---

## 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.

---

## 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.**

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.



---

# Delivering Reports

---

## Best Practices

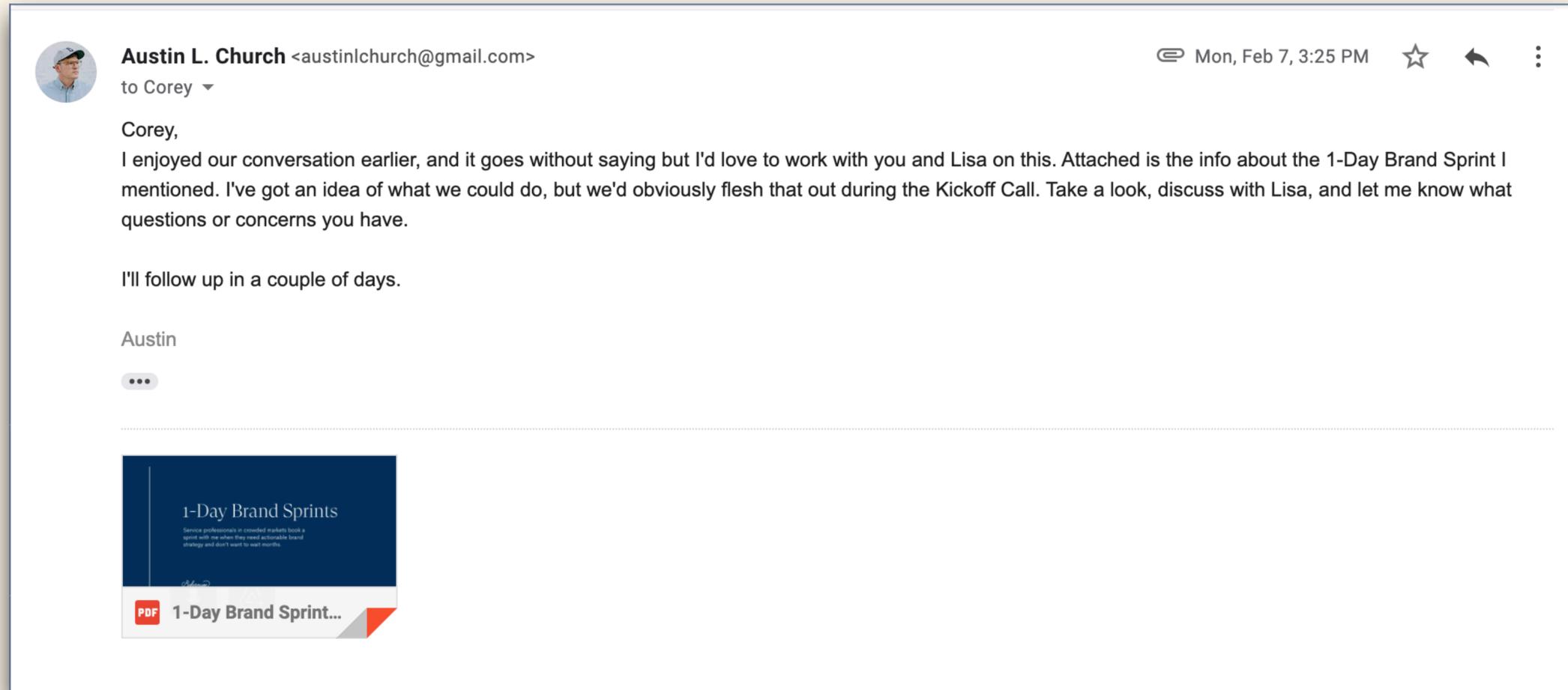
- Let the copy *\*age\** for 24 hours.
- Hire a designer to create a beautiful report template.
- Don't be afraid to be generous with a Bonus section or extra ideas you research on your own to add more detail or color.
- Deliver the report within 2-3 days.
- Follow up after 30 days, 60 days, 90 days.

**FYI...** You can use the Temi app ([temi.com](https://temi.com)) to *\*write\** the report content aloud.

---

---

# 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.

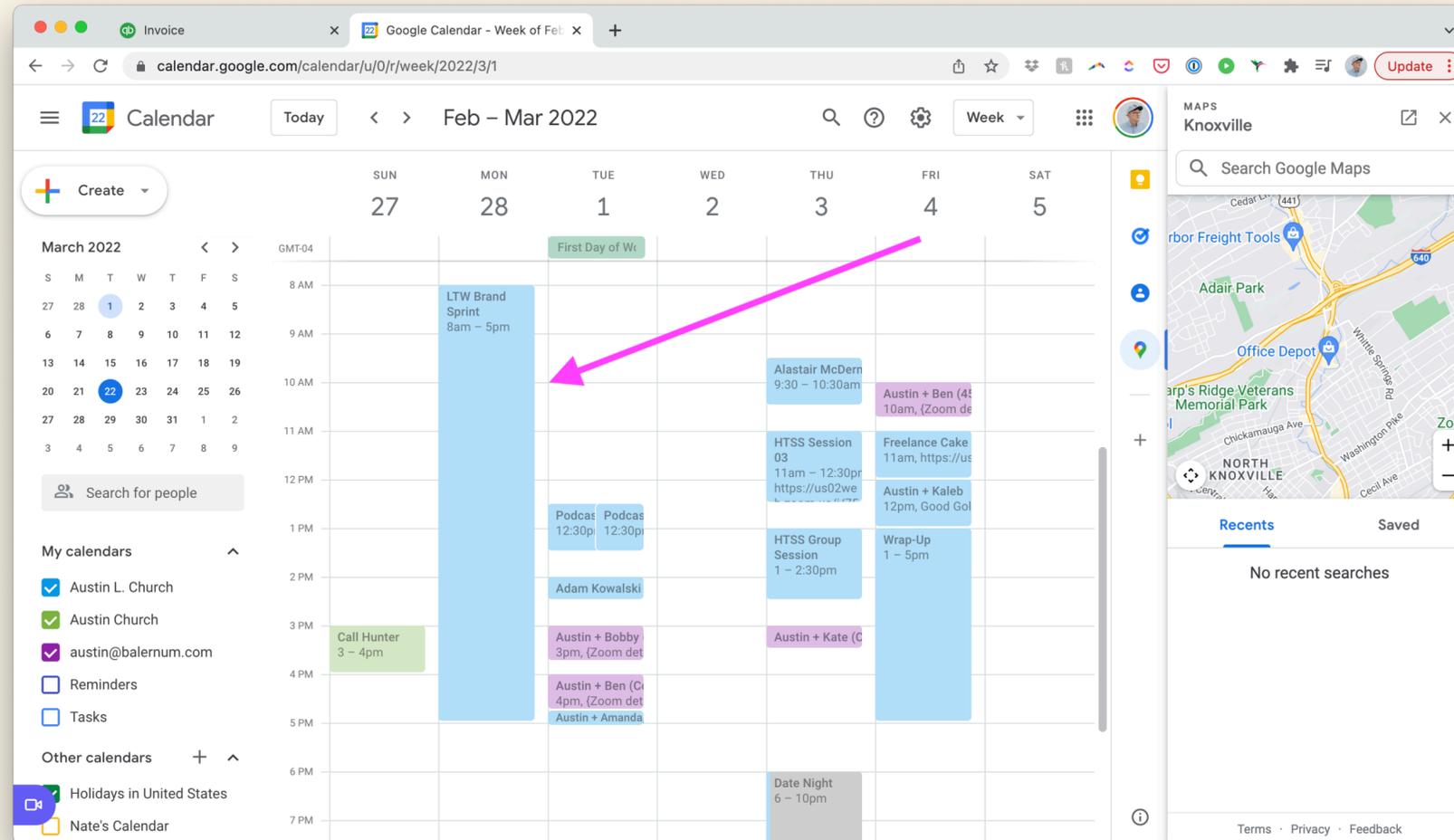
Total: \$3,275.00

Amount received: \$3,275.00

Balance due: \$0.00

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

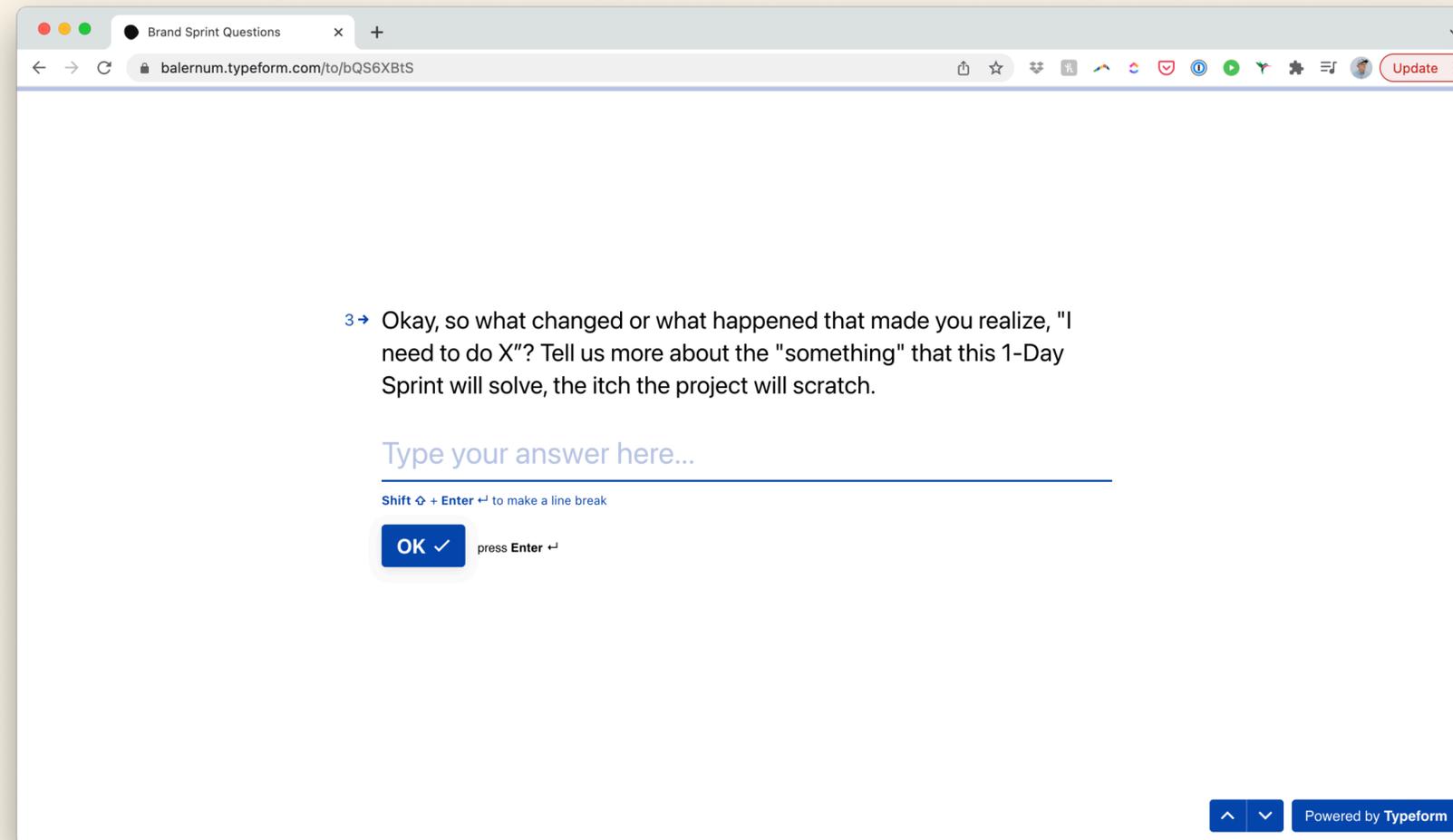
Send the invoice.



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.**

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

(And the selling continues after the client pays the invoice.)

---

**Remember...**



The screenshot displays a Google Calendar interface for the week of February 13-19, 2022. The calendar is in a weekly view. A pink arrow points to a 'Kickoff Call [LTV]' event on Friday, February 18, at 11am. Other events include 'Austin L. Church' on Friday, 'Austin + Ben (45 min)' on Friday, 'Austin + Shlome' on Tuesday, 'Austin + David' on Tuesday, 'Austin + Bobby' on Tuesday, 'Ed & Austin - record first training session' on Wednesday, 'Ed Gandia / JVI' on Wednesday, 'Austin + Jay (E)' on Wednesday, 'Liam Carnahan' on Wednesday, 'Call Hunter' on Sunday, and '2301 Day' on Saturday. The sidebar on the left shows 'My calendars' with 'Austin L. Church', 'Austin Church', and 'austin@balernum.com' checked. The sidebar on the right shows a Google Maps view of Knoxville, TN, with a search bar and a 'Recents' section.

**Optional: Book Kickoff Call.**



# 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

*Balernum*

A BRANDING & MARKETING STUDIO

---

**Create agenda.**

The LTW Group Questions

Lucida Grande Regular 12 B I U 1.0

→ 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 <sup>steps in the process</sup>  
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 people <sup>transparency</sup>
- 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>  
to Corey ▾

Fri, Mar 4, 4:58 PM ☆ ↶ ⋮

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).

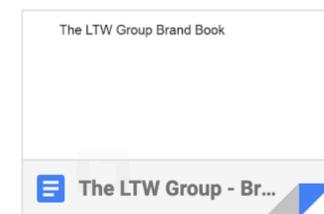
Regardless, here's the new and improved [The LTW Group brand book](#).

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.**

---

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

- Set a timer for 20 minutes. Go back through this session's slides and write down the steps you'll take to 1) create a premium client experience, 2) facilitate your strategy session, and 3) deliver the report.
- Spend a timer for another 20 minutes. Gather your initial set of questions. What will you need to know before the session? What will you potentially ask during the session? What are common obstacles and pitfalls that the client may face and what questions will determine the client's preparedness?
- Set a final timer for 20 minutes. What are your outstanding tasks—e.g., stuff you still need to create to deliver this engagement? Assign specific tasks to specific days in your calendar.

---

# What Upcoming Sessions Cover

---

# Session 5

# Assignment

**Set a timer for 20 minutes.** Go back through this session's slides and write down the steps you'll take to 1) create a premium client experience, 2) facilitate your strategy session, and 3) deliver the report.

**Set a timer for another 20 minutes.** Gather your initial set of questions. What will you need to know before the session? What will you potentially ask during the session? What are common obstacles and pitfalls that the client may face and what questions will determine the client's preparedness?

**Set a timer for 20 minutes.** What are your outstanding tasks—e.g., stuff you still need to create to deliver this engagement? Assign specific tasks to specific days in your calendar.