

CREATIVE  
AGENCY  
SUCCESS

# Kick-Off Call

## Workbook

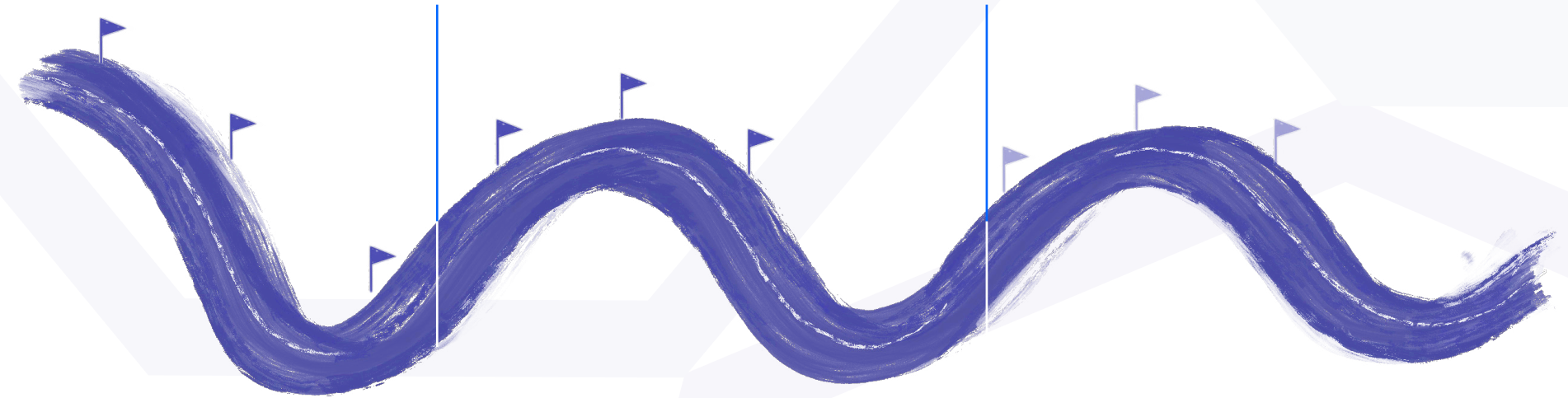


# Our Journey Together

CREATIVE  
AGENCY  
SUCCESS

Year 1

Year 2

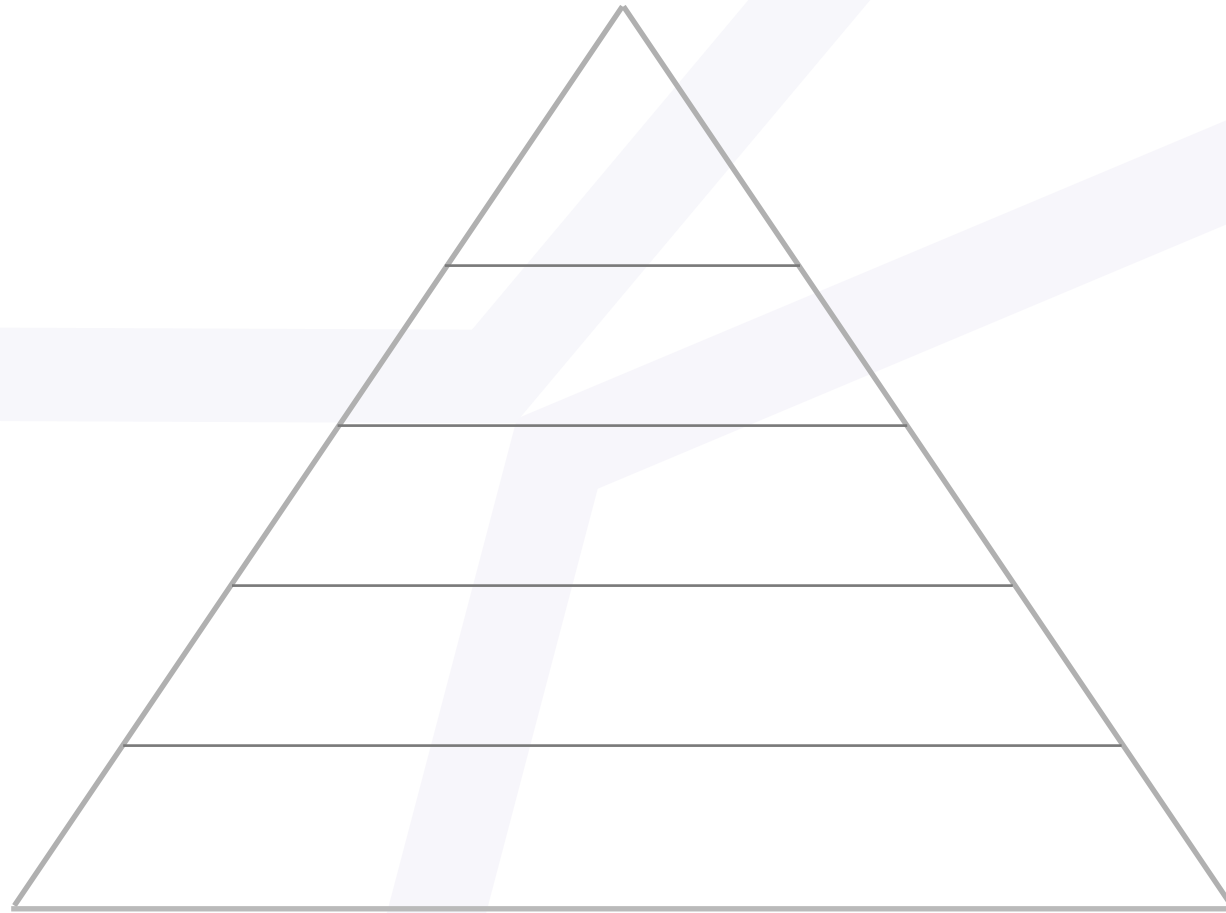


Today

Year 1 Goals

Year 2 Goals

# The Method



# Our Focus



# Agency Scale Method

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AGENCY  
SUCCESS

## Freedom and Flourish

- Develop Leaders •Celebrity Agency
- Client Selection •Profit Optimization
- The CEO

**asset**

**sale-able**

## Scale and Expansion

- Signature System •Authority Building
- Expand Reach •Value Price •Fill Funnel

**cas agency**

**scalable**

## Trajectory and Momentum

- Niche •Pricing Correction •Rock Solid Offer
- Sales System •Lead Generation

**start-up**

**change up**

- Time-strapped •Industry Agnostic
- Full-Service •Everything to Everyone
- Marginally Profitable

**freelancer**

**survival**

# Checking Your Temperature



Lead Generation

Sales Conversion

Service Delivery

STUCK

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WORKING ON

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ROCKSTAR

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# Our Commitment

- To hold you to a higher standard than you hold yourself, and keep you accountable to your best results.
- To train you in the latest strategies for Lead Generation, Sales Conversion & Service Delivery monthly with live training webinars.
- We must do the work with you live in two-day intensives, three times a year, so you don't just leave with a to-do list.
- We must critique your work, break it down and put it back together again so it pulls better than you could do on your own.
- We must coach you every week, and you are never more than 48 hours away from the answers you need.
- We must listen to you. We will be accessible and respond to your requests in 48 hours or less.
- We must give you the latest strategies, tactics and tools in an easy to use how-to format that makes implementation a breeze.
- We must help you plan your projects, and work with you every month to make them happen.
- We must work with you between our live intensives to make sure you're always clear and moving forward.
- We must treat you with class and care in every interaction.
- We apologize if we ever let you down and try to make it right.
- We must not let you off. Because if we do, we let you down.

# Your Commitment



- You will meet payment terms as specified.
- You will not disclose any information provided to you (including this material) that is intellectual property in nature to any other business or individual. You must respect our IP
- You must be quick to implement, quick to ask for help when you need it, and quick to share your wins and lessons.
- You must complain if we ever do something to upset you. This gives us an opportunity to apologize and make things right.
- You must keep your 12-month commitment
- Live Sessions Are Recorded – Attendance of any live event is acknowledgement and agreement that your likeness is being recorded and may be published to the membership site for the consumption of other members.
- You Must actively engage during live events, with camera on, answer questions and ask any questions that you have.
- Fellow Members are Colleagues NOT Prospects

# Your Focus

CREATIVE  
AGENCY  
SUCCESS

Step 1

Step 2

Step 3

Step 4

## Training

## Detail

## Outcome

## Time

Trajectory

- Niche Selection
- Rock Solid Offer
- 90 Day Plan

- Clarity
- Foundation
- Reclaim Time

7-14 Days

Momementum

- Pricing Systems
- Lead Generation
- Sales Conversion

- Profit
- Marketing Plan
- Sales System

7 - 30 Days

Game Plan

- Right Next Thing

Action



# Creative Agency Success – Agency Accelerator

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## Support & Community

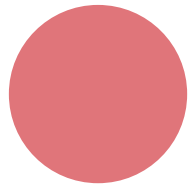
- Agency Community
- Slack Channels
- Growth Hours:  
Tuesdays & Thursdays  
9am PST / 12pm EST / 5pm GMT

## Training & Resources

- Member Portal
- Recorded Trainings
- Worksheets & Templates

## Events

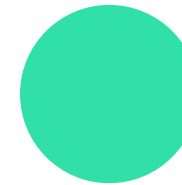
- 3 Day Intensives
- Monthly Training
- Skill Sessions & Roundtables



- Stuck
- Unclear
- No right next thing



- Not working / unsure how to implement
- Low-energy
- Need Support



- Clear Focus
- Making Progress
- High Energy

## Linked Resources



### Live Sessions

[zoom.creativeagencysuccess.com](https://zoom.creativeagencysuccess.com)



### Sync Calendar

[calendar.creativeagencysuccess.com](https://calendar.creativeagencysuccess.com)



### Members Portal

[members.creativeagencysuccess.com](https://members.creativeagencysuccess.com)



# 2025 Event Calendar

	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T						
Jan			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Feb						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28			
Mar						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Apr	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30						
May		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Jun			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
Jul	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Aug				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
Sep	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30						
Oct		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Nov					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
Dec	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					

Key: Intensive Training Goal Setting/ Hot Seat In-Person Event

# Agency Levels

We conceptualized  
agency sizes using our  
9 unique classifications...



**Terrier**  
\$10K-\$19K



**Maltese**  
\$20K-\$29K



**Spaniel**  
\$30K-\$39K



**Beagle**  
\$40K-\$54K



**Retriever**  
\$55K-\$70K



**Dalmation**  
\$70k-\$85k



**Labrador**  
\$85K-\$100K



**Great Dane**  
\$100K-\$125K



**Shih Tzu**  
\$125K+

# Impact Planner



Mon      Tues      Wed      Thur      Fri      Sat      Sun

EARLY							
MORNING							
NOON							
AFTERNOON							
EVENING							

# Training Video QR Codes

## Lead Generation

## Sales Conversion

## Service Delivery

\$50k+



**Your Appointment Funnel**

[qrco.de/bd1aHd](https://qrco.de/bd1aHd)

**Establish Authority w Content**

[qrco.de/bcRvBB](https://qrco.de/bcRvBB)



**Video & Content Presence**

[qrco.de/bcrhP1](https://qrco.de/bcrhP1)



**Managing Sales Objections**

[qrco.de/bcRgSn](https://qrco.de/bcRgSn)

**Optimize Sales Process**

[qrco.de/bd1cJE](https://qrco.de/bd1cJE)



**Creating Your Sales Model**

[qrco.de/bdAloR](https://qrco.de/bdAloR)



**Conscious Leadership in Action**

[qrco.de/bcRgYG](https://qrco.de/bcRgYG)

**Profitability Optimization**

[qrco.de/bd1a1a](https://qrco.de/bd1a1a)



**Unlock Your Potential – Naming Your Disbelief**

[qrco.de/bdAlpQ](https://qrco.de/bdAlpQ)

\$25–50k

**Authority Building Through PR**

[qrco.de/bcRgLV](https://qrco.de/bcRgLV)



**Webinars That Convert**

[qrco.de/bd1ZyH](https://qrco.de/bd1ZyH)

**Email Sequences for Conversion**

[qrco.de/bcRfpx](https://qrco.de/bcRfpx)



**Capabilities Decks That Convert**

[qrco.de/bcRgNj](https://qrco.de/bcRgNj)



**Discovery Call – The Conceptual Buy In**

[qrco.de/bcRgPg](https://qrco.de/bcRgPg)

**Virtual Meeting Technology & Presence**

[qrco.de/bd1a0l](https://qrco.de/bd1a0l)



**Training High Performing Teams**

[qrco.de/bd1a2R](https://qrco.de/bd1a2R)



**Client Communication Standards – Always be Selling**

[qrco.de/bd1a3C](https://qrco.de/bd1a3C)

**Client Future – Closing Project to Upsell**

[qrco.de/bd1a3m](https://qrco.de/bd1a3m)



\$10–25k



**Linked-in Lead Generation**

[qrco.de/bcRfdb](https://qrco.de/bcRfdb)

**Networking for Success**

[qrco.de/bcWViC](https://qrco.de/bcWViC)



**Offer Writing Masterclass – Creating Offers that Sell**

[qrco.de/bd1Zz6](https://qrco.de/bd1Zz6)



**Qualification Call**

[qrco.de/bcRgR6](https://qrco.de/bcRgR6)

**The Close Proposal Presentations**

[qrco.de/bcRgU3](https://qrco.de/bcRgU3)



**Sales Skills – Emotional Connection**

[qrco.de/bd1a1B](https://qrco.de/bd1a1B)



**Budget Templates & Pricing Theory**

[qrco.de/bcb74m](https://qrco.de/bcb74m)

**Client Onboarding: Building Long Term Relationships**

[qrco.de/bcfFcH](https://qrco.de/bcfFcH)



**Delivery Method**

[qrco.de/bch8WA](https://qrco.de/bch8WA)



CREATIVE  
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SUCCESSION

# Your Filter

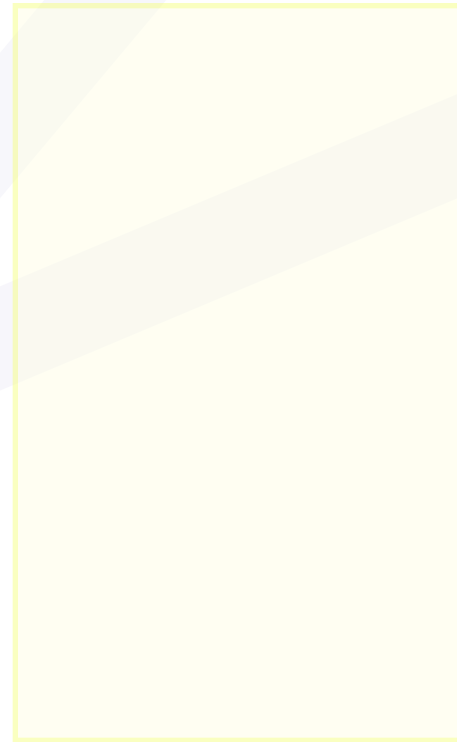


Delegate

Not a Priority

To Do

Done | Wins



# Your Filter

Week End: \_\_\_\_\_

Focus: \_\_\_\_\_



	Mon	Tues	Wed	Thur	Fri
Task					
Time Dedication					

Notes



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Notes



A large, empty rectangular box with a thin gray border, intended for taking notes.