

# client services series: a year in the life of a hypothetical B2B account

< live webinars fall 2012 + on-demand access >

an immersive experience in **account management, retention and growth**

marketing agency insider

# featuring

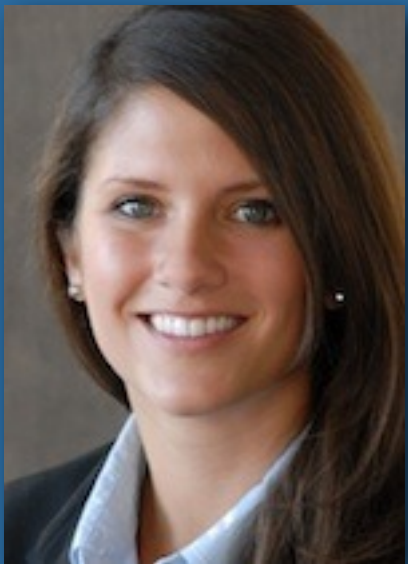


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# client services series

Welcome to the Marketing Agency Insider ***Client Services Series: A Year in the Life of a Hypothetical B2B Account.*** Prepare to be immersed like never before in the planning, execution and evolution of an integrated marketing campaign.

## what's included?

- ▶ 7 live webinar sessions + on-demand access.
- ▶ Planning and management of a **hypothetical B2B software account — Social Business Unlimited (SBU).**
- ▶ **Crowdsourced learning and adaptive curriculum** that changes weekly based on attendee insight.
- ▶ Dedicated private **Yammer social network** for real-time collaboration among attendees.
- ▶ Exclusive **resource downloads**, including private beta versions of Agency Manager, Scorecard and GamePlan— management tools featured throughout the series.
- ▶ Insight from **leading marketing agency minds.**
- ▶ Unique **affiliate code**, featuring revenue sharing on event registration referrals.
- ▶ Signed copy of **The Marketing Agency Blueprint.**

# the story of social business unlimited (SBU)

Social Business Unlimited (SBU), a **hypothetical company that delivers enterprise social network solutions**, is at the epicenter of a business revolution. [Forrester predicts](#) that the enterprise social software (ESS) market will grow at an annual compound rate of 61 percent over the next five years, exceeding \$6.4 billion by 2016. SBU is two years old, sitting on \$5 million in venture capital funding, and stacked with brilliant developers.

However, it **faces seemingly insurmountable challenges** in a highly competitive space. While the company has capital, it lacks internal competencies in key marketing disciplines; it has made some PR and customer service missteps in its efforts to scale; and it can't outspend its high-profile competitors that are entrenched in the market.

**It's a race to the top of a multi-billion dollar industry**, and your agency has the opportunity to take them there.

SBU has allocated \$8,000/month for agency services. It's a high-risk account that could be gone within six months if you don't deliver, but it also has huge upside, with the potential to grow to a \$15,000 - \$20,000/month account within a year.

Join us as we adventure through a year in the life of this hypothetical company and marketing program, and **collaborate with your peers to manage, retain and grow the SBU account**.

# live webinar schedule

**all sessions conducted live via GoToMeeting, and available on demand**

[Session 1 — The Marketing Assessment: How to Analyze Companies, Forecast Potential and Align Expectations](#): Thursday, Oct. 25

[Session 2 — The Scorecard: How to Build a Customized Marketing Performance Dashboard](#): Thursday, Nov. 1

[Session 3 — The GamePlan: How to Connect Agency Services to Audiences and Metrics that Matter](#): Thursday, Nov. 8

[Session 4 — The Honeymoon: How to Mix Builders and Drivers \(Q1\)](#): Thursday, Nov. 15

[Session 5 — The Reality: How to Make the Partnership Work through the Ups and Downs \(Q2\)](#): Thursday, Nov. 29

[Session 6 — The Tipping Point: How to Adapt and Evolve at a Critical Stage in the Client Lifecycle \(Q3\)](#): Thursday, Dec. 6

[Session 7 — The Renewal: How to Solidify the Relationship and Focus on Long-Term Growth \(Q4\)](#): Thursday, Dec. 13

# session 1 — the marketing assessment:

## how to analyze companies, forecast potential and align expectations

live oct. 25 @ 1 p.m. est

The strength of your agency is directly related to your ability to **retain and grow the right accounts**. Loyal clients lead to higher retention rates, greater profit margins, more predictable cash flow and stronger referrals.

Your agency's success starts with the marketing assessment.

Every element of an organization, as it relates to marketing, can be divided into **assets, neutrals and escalators**. By evaluating and scoring these elements, you can forecast a client's potential, set realistic expectations, and allocate time, money and talent.

If your agency can properly assess leads and new clients, it can better **determine services and pricing, establish performance benchmarks, and define integrated marketing plans**.

Session 1 demonstrates how to utilize subjective assessments — from the viewpoint of internal client stakeholders — to **create a strong partnership foundation, reduce client turnover rates, and increase performance and profitability**. We'll analyze Social Business Unlimited's [Net Marketing Score](#) report to identify strengths, flag weaknesses and threats, define foundational projects, and finalize an integrated service package.

- ▶ Conduct **discovery** research.
- ▶ Perform a Net Marketing Score **assessment**.
- ▶ Assess and classify factors as **assets, neutrals and escalators**.
- ▶ Analyze **opportunities**.
- ▶ Identify **weaknesses and threats**.
- ▶ Forecast **potential**.
- ▶ Agree on **key metrics** that will drive agency efforts.
- ▶ Define **foundational projects**, including brand, website and marketing technologies.
- ▶ Provide preliminary strategic **recommendations**.
- ▶ Construct the **service package, pricing and contract**.
- ▶ Determine the agency **account team**.
- ▶ Establish clear and realistic **expectations**.
- ▶ Set a tone of **transparency and trust**.



# session 2 — the scorecard:

## how to build a customized marketing performance dashboard

live nov. 1 @ 1 p.m. est

Marketing executives — your clients — are drowning in data. They have access to powerful tools that produce endless streams of information about prospects and customers. However, **data without analysis is simply noise.**

Marketing agencies from every discipline — advertising, PR, social, SEO, content and web — have the opportunity to evolve, and play an integral role in **bringing structure and meaning to the numbers.** Your account teams can and should be extracting insight from the wealth of information available to clients, and using data to validate your impact.

Transparency is the future of business. **Be proactive in assessing your performance,** be willing to adapt in real-time based on results (or the lack of), and give your clients the knowledge they need to make informed business decisions.

In session 2, we'll **build a custom Scorecard** for SBU that will house all primary and secondary metrics. The Scorecard template will be provided to all registrants under Creative Commons 3.0.

- ▶ Identify Key Performance Indicators (KPIs) that drive agency activities.
- ▶ Customize the four primary sections of the Scorecard — **brand, leads, sales and loyalty.**
- ▶ Input and analyze **2012 data.**
- ▶ Establish **benchmarks.**
- ▶ Define quarterly **goals.**
- ▶ Review **Scorecard maintenance** processes.
- ▶ Determine collaboration **permissions.**
- ▶ Create client report **templates.**

	Key Metrics					
	125 Total Leads	\$12.25 Cost Per Lead	10 Total Customer Conversions	55 Content Downloads	10,250 Website Visits	774 Blog Subscribers
June 2012						
3-Month Average	110 Total Leads	\$15.00 Cost Per Lead	12 Total Customer Conversions	75 Content Downloads	9,225 Website Visits	725 Blog Subscribers
6-Month Average	92 Total Leads	\$17.00 Cost Per Lead	8 Total Customer Conversions	65 Content Downloads	9,000 Website Visits	710 Blog Subscribers

9-Month Average	85 Total Leads	\$17.00 Cost Per Lead	8 Total Customer Conversions	65 Content Downloads	9,000 Website Visits	710 Blog Subscribers
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# session 3 — the gameplan:

## how to connect agency services to audiences and metrics that matter

live nov. 8 @ 1 p.m. est

Leading marketing agencies **turn information into intelligence, and intelligence into action**. They build campaigns that consistently produce measurable outcomes, including website traffic, leads and sales. Agencies must shift away from arbitrary metrics, such as media impressions, reach, advertising equivalency and PR value, and become measurement geeks obsessed with data-driven services.

Simplicity and agility are critical to SBU's success.

In session 3, we'll build the SBU GamePlan, and demonstrate a **process for connecting all projects (aka epics) to audiences and outcomes**. The GamePlan template will be provided to all registrants under Creative Commons 3.0. We'll also lay the groundwork for agile program management via 37Signals' [Basecamp](#).

- ▶ Establish and segment **audiences**.
- ▶ Define and profile **buyer personas**.
- ▶ Determine **roles and responsibilities** of the agency/client marketing teams.
- ▶ Evaluate needs and opportunities to align with other **agency partners** for niche capabilities.
- ▶ Build the **Campaign Snapshot**, which guides the overall strategy and puts structure to agency recommendations.
- ▶ Brainstorm the **Epic Center**, and associate activities, audiences and KPIs.
- ▶ Visualize builder vs. driver **allocations**.
- ▶ Forecast **service hours** using the Fibonacci sequence.
- ▶ Create the month-one **GamePlan** with activities and time forecasted by agency pro.
- ▶ Construct the GamePlan **launch deck** for client presentation.

Activities	Audiences					Key Metrics				
	Customers	Prospects	Media	Analysts	Partners	Leads	Conversions	Registrations	Downloads	Subscriptions
Product ebook	+	+		+		+	+		+	
Press release			+			+	+			+
Infographic	+	+				+	+			+
Webinar series					+	+		+		+
Guest blog post		+								+
Case study		+	+				+			
Customer testimonial video series		+					+			
Lead nurturing campaign		+					+		+	+



# session 4 — the honeymoon: how to mix builders and drivers (Q1)

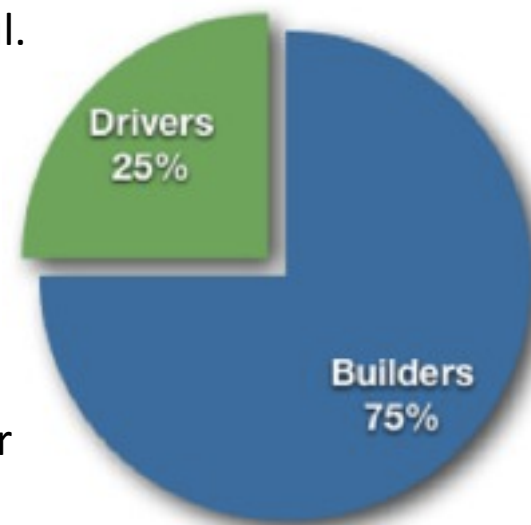
live nov. 15 @ 1 p.m. est

You've completed the Net Marketing Score assessment, customized the Scorecard and built the GamePlan. The client is anxious to get started, and your account team is primed to deliver. **There are endless possibilities, and unlimited potential.** The Honeymoon period has begun.

The first three months of a client-agency engagement are full of opportunity. Both parties are enthusiastic, motivated and hopeful. This is your chance to make an immediate impression with your processes, communications, dedication and performance. **The challenge lies in keeping expectations in line, while mixing builders and drivers.**

Builders are services designed to **set the foundation for success**, whereas drivers are intended to **produce short-term results**. Your agency's ability to succeed and bring value to clients requires a balanced and strategic approach to both.

In session 4, we'll walk through the first quarter of SBU's program, from activation of the GamePlan in month one, to presentation of the quarterly review at the end of month three. You'll be presented with scenarios, and encouraged to share thoughts and ideas in the private Yammer network leading into session 5.



- ▶ Activate **builders** to lay the foundation for long-term campaign success.
- ▶ Integrate **drivers** to produce short-term results.
- ▶ Establish a rhythm to client **communications and meetings**.
- ▶ Conduct **internal reviews** of account activity and performance.
- ▶ Learn to stay in tune with client **perceptions and expectations**.
- ▶ Maintain **agile project management** and efficient workflows.
- ▶ Fine tune client **approval processes**.
- ▶ Establish **monitoring and reporting systems**.
- ▶ Compile monthly **Scorecards**.
- ▶ Conduct **Scorecard reviews**.
- ▶ Prepare monthly **GamePlans**.
- ▶ Build and present the quarterly **account review deck**.

# session 5 — the reality:

## how to make the partnership work through the ups and downs (Q2)

live nov. 29 @ 1 p.m. est

Invoice number four is on the way, bringing SBU's services total to \$32,000. While your main client contact, the marketing director, loves your team and is encouraged by progress thus far, his boss, the chief marketing officer (CMO), has decided to join the weekly account update meeting for the first time. He has suddenly taken a keen interest in the agency, and is curious to learn more about your performance to date.

The meeting kicks off with the usual small talk and pleasantries, then the CMO takes the reins.

He wants to know **why you're spending so much time and money on social media engagement and blogging**. He's upset that **competitors are all over the tech blogs**, and dominating page one of Google. He can't go anywhere on the web without seeing their re-targeted ads, and now **the CEO is curious to know why her counterpart is speaking at SXSW and Enterprise 2.0**, and being quoted in Inc. and Wired, while she toils in relative anonymity.

Session 5 is The Reality. **This is when relationships are made or broken.**

- ▶ Learn techniques to deal with **client challenges, and personalities**.
- ▶ Develop answers to client **FAQs**.
- ▶ Adapt strategies in **real-time** to seize market opportunities.
- ▶ Address inefficiencies in the account to improve your team's **productivity and performance**.
- ▶ Deal with agency growth issues that are affecting system-wide **workflow and capacity**.
- ▶ Take a proactive approach to **churn risks, scope creep and service quality** concerns.
- ▶ Concentrate on closing the **sales loop**, and connecting your activities to results.
- ▶ Prove value on **short-term campaigns** that drive the overall program.

# session 6 — the tipping point:

## how to adapt and evolve at a critical stage in the client lifecycle (Q3)

live dec. 6 @ 1 p.m. est

The account is turning the corner, and gaining momentum. Some of the early foundational work (the builders) is showing real value now, and the client's confidence level in your work is rising. **Now is the time to go all in, and solidify the partnership moving forward.**

But, just as things look brightest, **your client contact, the marketing director, announces he's leaving the company.** The CMO, whom you clashed with a bit last quarter, is the interim contact until they replace the marketing director.

The good news is that you're running a **real-time, results-driven program**, so you can always fall back on performance. The bad news is that with a new marketing director comes an array of variables, including the possibility that he or she will have a preferred agency in tow.

All of the sudden, one of your core accounts, which is providing stability and opportunity to the agency, enters **the "Red Zone."** This is The Tipping Point, a period every agency, and every account, goes through. Except, in this case, we'll work through it as a group — **sharing insights from our collective experiences, and activating a plan to retain and grow the SBU account.**

- ▶ Push the envelope with **advanced marketing techniques.**
- ▶ Integrate content and social activities to drive **PR efforts** with tech bloggers and media.
- ▶ Pursue PR opportunities for SBU leadership, including **speaking engagements and media placements.**
- ▶ Turn the loss of the client contact into an **opportunity for growth.**
- ▶ Expand the **social marketing program** to include new technologies and techniques.
- ▶ Maximize the use of SBU's assets, including its **existing customer and lead databases.**
- ▶ Pump out high-quality content packed with **original research and proprietary data.**
- ▶ Dig into the **analytics** and Scorecard to identify trends and opportunities.
- ▶ Focus on **relationship building** between agency leadership and high-level client contacts.

# session 7 — the renewal:

## how to solidify the relationship and focus on long-term growth (Q4)

live dec. 13 @ 1 p.m. est

The agency has invested 1,000+ hours. The client has invested nearly \$100,000. The results are in for year one, and now is time to **focus on long-term growth of the account**.

In this final session —The Renewal — we'll run Q4 of the program, analyze Scorecard data, build an annual review deck, and take a fresh look at the future of SBU.

The week leading into session 7 will include a collection of **challenges and exercises** in the private Yammer group, which will fuel discussion and debate as we close out the Client Services Series.

- ▶ Conduct an **internal review**, asking the hard questions of your account team.
- ▶ Analyze performance to date, and critically **assess your value** to the client.
- ▶ Invest in **account development activities** to show your commitment and motivation.
- ▶ Take risks, and bring **innovative ideas** to the table for year two.
- ▶ Discuss tips and processes to propose, and win, a **service package increase**.
- ▶ Build an **annual review deck**.
- ▶ Parlay success with SBU into **new business development opportunities**.

# event pricing

## register early and save

- ▶ **Super Early Bird** = \$450 thru Sept. 15 (35% off)
- ▶ **Early Bird** = \$550 thru Oct. 14 (21% off)
- ▶ **Standard** = \$695

[register now](#)

an immersive experience in **account management, retention and growth**



Developed by *The Marketing Agency Blueprint* author, Paul Roetzer, **Marketing Agency Insider** (@agencyin) is the hub for marketing agency news, information, resources, training, education and engagement. The website is dedicated to building a **more open and collaborative agency ecosystem**.

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