BOARDROOM

Spring 2021 Retreat

Notes:

Insights & Actions Summary

Take a Stand + How to Onboard New Clients Successfully	Insight:	Insight:	Insight:
	Action:	Action:	Action:
The Modified Wishbone Technique	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Crafting Winning Proposals	Insight:	Insight:	Insight:
	Action:	Action:	Action:

Insights & Actions Summary

Escaping the Overwhelm Trap	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Capacity Planning	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Self-Care	Insight:	Insight:	Insight:
	Action:	Action:	Action:

Insights & Actions Summary

"Gateway" Actions for your Top 2 Projects	Project: Gateway Actions:	Project: Gateway Actions:

Notes:

Your 2021 Success, Defined

What does your business look like?	What great things have happened to you this year?	How are you feeling about it?

Your 90-Day Success, Defined

What does your business look like?	What great things have happened to you over the past 90 days?	How are you feeling about it?

Notes:

HOW TO ONBOARD NEW CLIENTS SUCCESSFULLY

Notes:

Preboarding

After signing, reacquaint yourself with the following:

- [ ] Client's pain
- [ ] Impact of these pain
- [ ] Client's primary and secondary objectives
- [ ] Agreed-upon solution & specifics of that solution (including deliverables)
- [ ] Project timeline
- [ ] Client points of contact & their roles in the project
- [ ] Specifics of process you'll be using/following
- [ ] Overall client expectations

Next, schedule project kickoff call:

- [ ] Make it easy to schedule
- [ ] Follow up as needed
- [ ] Reinforce who from their team needs to be on the call (and why)

Housekeeping:

- [ ] Send copy of executed contract
- [ ] Send copy of your W9 (or any other regulatory compliance paperwork)
- [ ] Send creative brief, if applicable
- [ ] Send any other requested info
- [ ] Mail your welcome kit

Tip: create and use a checklist for preboarding tasks!

Kickoff Call

i. Quick introductions

ii. Agenda

#1: Housekeeping

[A] Project:
- [ ] What we're working on
- [ ] Primary and secondary objectives
- [ ] Get clarification, if needed

[B] People:
- [ ] Client team members (including SME's) & their roles/responsibilities
- [ ] Team members on YOUR side (VA, writer, you, etc.)
- [ ] Agree on SPOC on client's side and his/her role

[C] Process:
- [ ] Detailed timeline, including start date, all due dates, etc.
- [ ] Point out any critical dates & milestones & get agreement on importance

[D] Communication:
- [ ] Agree on how we'll handle feedback/revision process
- [ ] How we'll communicate (platform, process, frequency, content of comms)
- [ ] How often we'll meet and why (if applicable)
- [ ] Set the right boundaries and expectations (not available weekends, evenings)
- [ ] How we'll handle any snags if/when they happen (contingencies), such as SME's not returning calls/emails

Kickoff Call (cont.)

#2: Project questions

- [ ] Detailed creative brief discussion
- [ ] Or run through your project questionnaire

#3: Next Steps

- [ ] Restate the next steps in the process + what to expect
- [ ] Schedule next call, if needed (while you have key people on the call)

#4: Reinforce + Questions

- [ ] Reiterate your excitement for the project
- [ ] Questions/concerns?

Preboarding v 1.0

Your Preboarding, Version 1.0

Kickoff Call v 1.0

Your Kickoff Call, Version 1.0

Notes:

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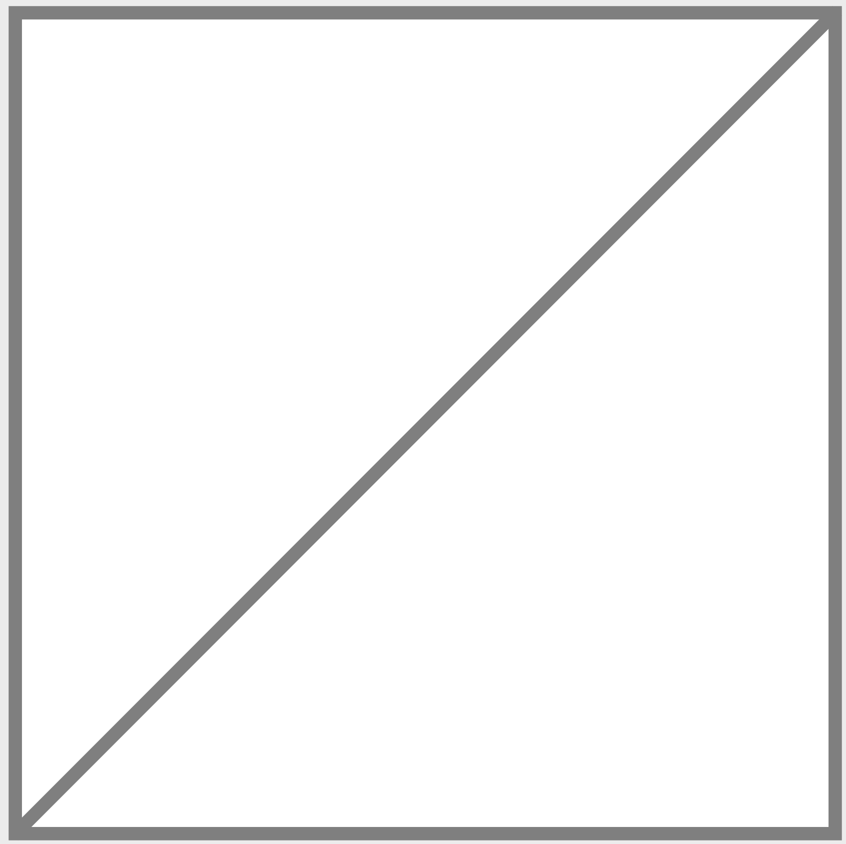
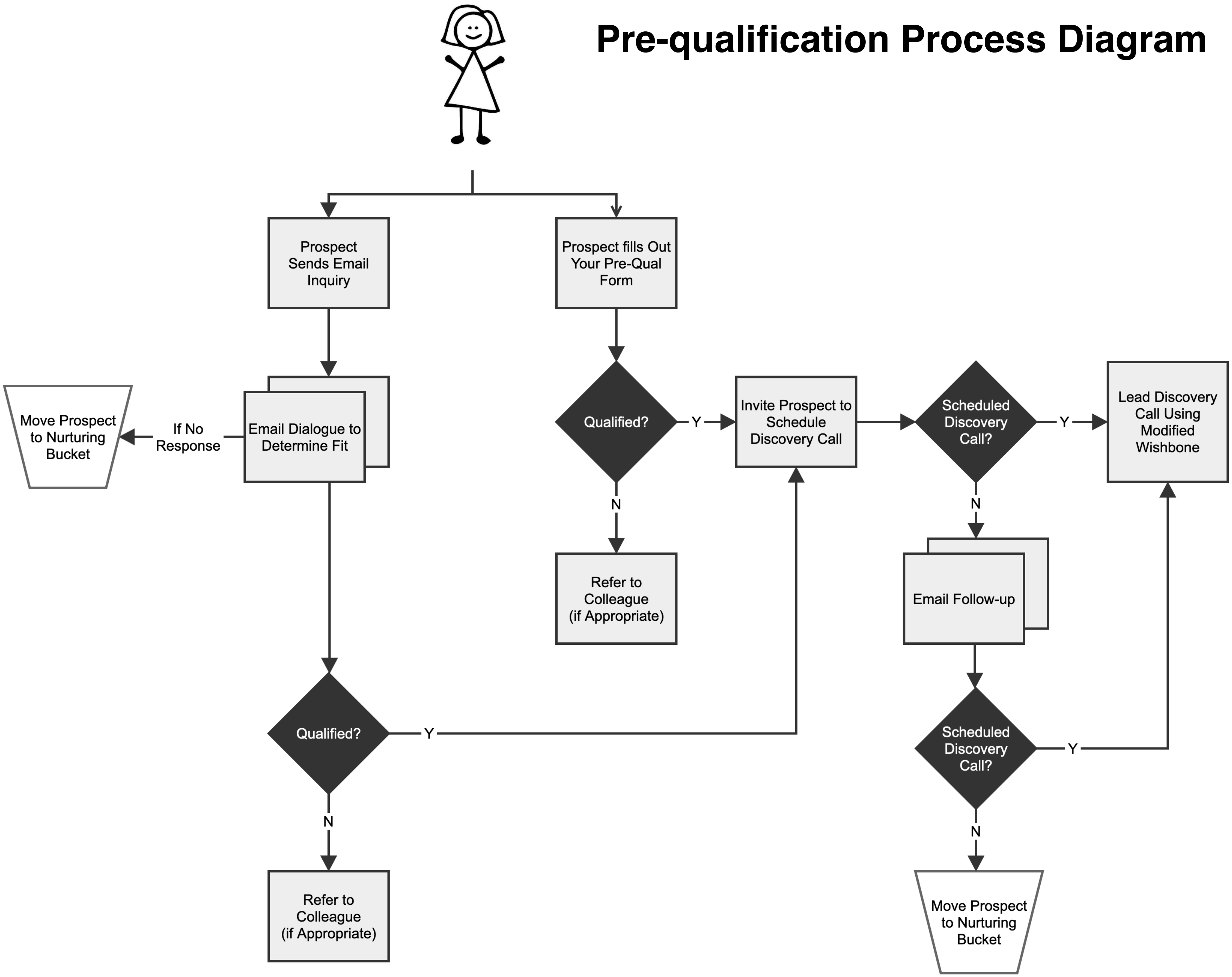
THE MODIFIED WISHBONE TECHNIQUE

Notes:

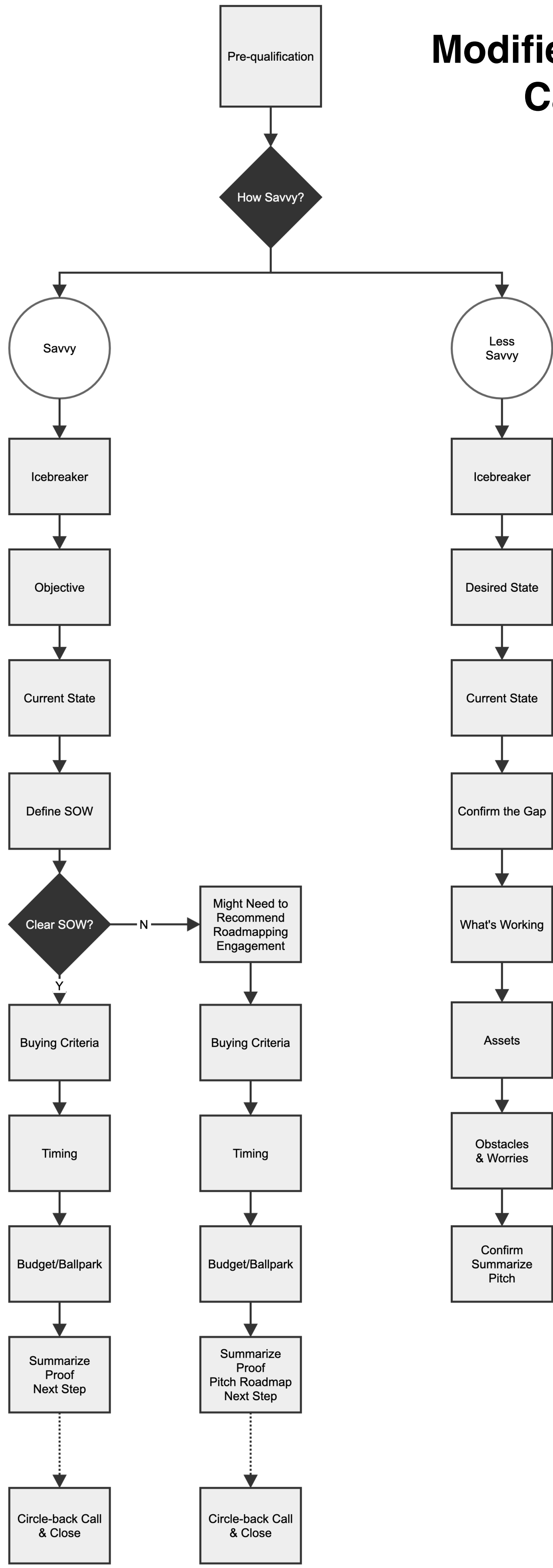
Level of Sophistication Drives the Solution



Pre-qualification Process Diagram



Modified Discovery Call Flow



Savvy Prospect Checkpoints + Questions

Icebreaker:
"Thanks for reaching out and for connecting with me today. The goal of this call is to learn more about what you're trying to accomplish and to see if I may be able to help you with that! This call usually takes 30 minutes. Does that work with your schedule?"

"Great! Before we get started, I'm just curious. How did you hear about me/us?"

Objective:
"What are you trying to accomplish?"
"What are you looking for?"
"What do you need help with?"

Current State:
"How are you addressing this now?"
"What kind of challenges is this creating?"
"What makes this an important project/initiative for you?"

Define SOW:
"How are you thinking about addressing this?"
"What do you think you'll need?"
"What options are you considering?"
"Have you considered creating a _________ to do _____________?"
"There are several aspects to solving this challenge. You will probably need a ________, a ________ and a series of ________. Are these some of the things you're considering?"

Buying Criteria:
"How will you be making a decision?"
"Who else will be involved in making this decision?"
"Have you worked with an outside __________ before? If so, what was your experience like?"
"Why did they not work out? What did you like best about that particular writer?
"Are you considering other firms/freelancers for this project?"
"Is this something you've tried doing (or are considering doing) in-house?"

Savvy Prospect Checkpoints + Questions (cont.)

Budget/Ballpark:
Budget: "What budget are you working with?"
Ballpark, if they don't share: "Well, to help you reach X objective, we're going to need to [explain SOW]. I can work up a detailed quote for you. But we'd be looking at somewhere between $X and $Y. Would that be within your budget?"

Summary + Proof + Next Step:

- [ ] SUMMARY: Based on what you've shared with me here, I feel confident I'd be able to provide you with a (deliverable) that enables you to (results / benefits) .

- [ ] PROOF: I've written website copy for more than X businesses your size, and I have significant experience in the ___________ industry. So I understand… [e.g., "many of the key business drivers…."].

- [ ] DEFINE NEXT STEP: I'm going to draft a proposal/quote and send it to you by __________. Let's schedule a circle-back call to review the proposal and answer any additional questions you may have. What's good for you later this week?"

Circle-back Call + Close:
"I wanted to follow up on the quote I sent you the other day. What questions can I answer for you?"

"Should we move forward with this?" or… "Are you ready to move forward with this?"

<u>Important</u>: Stop talking once you've asked that last question above!

Less-Savvy Prospect Checkpoints + Questions

Icebreaker:
“Thanks for reaching out and for connecting with me today. The goal of this call is to learn more about what you’re trying to accomplish and to see if I may be able to help you with that! This call usually takes 30 minutes. Does that work with your schedule?”

“Great! Before we get started, I’m just curious. How did you hear about me/us?”

Objective
Desired state:
“What are you looking to accomplish with __________?” [e.g., a new content marketing strategy]?

Current/Past
Current state:
“What ________ [e.g., content] do you currently have?”
“How are you using it?”
“How is it working?”

Past situations:
“What have you had in place before?”
“What have you done in the past?”
“How well did it work?

Confirm Gap & Timing
Summarize gap:
“So, it sounds like you want to be ________ [desired state] but you’re currently [current state]. Is that right?”

Timing
“By when would you ideally like to have this in place?”

Less-Savvy Prospect Checkpoints + Questions (cont.)

Assets
Current marketing & content assets?
Past assets that could be repurposed/reused?
People we could tap?
Other resources we could tap/use?

Obstacles & Worries
"What do you feel is getting in your way?"
"What things are bugging/concerning you about this?"

Summarize + Confirm + Close + Offer + Next Step

❑ SUMMARIZE the situation they've described.

❑ CONFIRM the potential for creating value here.

❑ CLOSING PROMPT: closing line/prompt —> "I'm confident I could help you create/build/draft/achieve __________. And I would love to have you as a client. What questions can I answer for you?"

❑ MAKE OFFER:
(a) Detailed offer if you have a package (e.g., roadmapping session) in place.
(b) Basic description + ballpark range if it's something custom you have to put together.

❑ DEFINE NEXT STEP: I'm going to draft a proposal/quote and send it to you by ________________. Let's schedule a circle-back call to review the proposal and answer any additional questions you may have. What's good for you later this week?"

Role-playing Exercise

Prospect Details

Scenario: Heard about you through Jennifer Pinker. She tells me she worked with you a couple of years ago at XYZ Co.

◆ We're a software company that helps all parties in a construction project collaborate and share data more effectively with each other and with the project owner.

◆ We have a new product that brings in all the subcontractors into the fold. Previously our solution worked between the owner and general contractor ... and between owner and the architect. The subcontractors were not typically in the system.

◆ We have 3 white papers in place. We also have a good collection of case studies, and we have a blog that's been in place for 18 months. But it's all geared toward owners, architects/engineers, and general contractors. We don't have any marketing content directed at subcontractors.

◆ We need an ebook or white paper to help redefine what it means to bring in the project's subcontractors into the system. Specifically, how it will benefit them ... how data will be shared ... why this is a better approach than the manual approach most of them are taking ... and how they'll be able to enter data only once.

◆ The current way subcontractors are doing this is very inefficient and disjointed. We help streamline the process while giving every stakeholder (including subs) real-time and permanent access to their data.

◆ It might sound surprising, but this is a very new and different concept at the subcontractor level.

◆ Not sure if we should go with a white paper or ebook. We're open to suggestions. We just need something marketing can use to help with lead generation at this level. Also something the sales team can use when discussing this with subcontractors.

◆ We'd like to get this done, finalized and out the door at the beginning of next quarter (in 6 weeks).

◆ Don't have a budget in mind. This just came up at a leadership meeting last week. It's not something we were originally planning to do. But it's a high-priority item for both the marketing and the sales team.

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CRAFTING WINNING PROPOSALS

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ESCAPING THE OVERWHELM TRAP:

HOW TO GO FROM "ALWAYS SWAMPED" TO A FUN, SUSTAINABLE BUSINESS STARTING THIS YEAR

Where does this end?

When does it end?

What will this path **lead to**?

What am I **hoping** will happen?

What am I **doing** about it?

What do you feel drives this cycle?

Compounded Inaction

Something you're doing (or not doing) that's troubling you:	Next Week:	This Time Next Year:
	5 Years from Now:	10 Years from Now:

Notes:

Escape the Overwhelm Trap

Raise Fees	Let Go of the Bottom

Schedule Non-negotiable Free days	Improve Cash Flow Management

Escape the Overwhelm Trap

Transition Existing Commitments	Hire Help
Change Your Model	Other

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CAPACITY PLANNING: SYSTEMS AND BEST PRACTICES

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SELF-CARE: LET'S GET 'REAL' ABOUT TAKING CARE OF THE GOOSE

Notes:

The 6 Categories

Morning Routine	Breaks	Diet, Exercise, Sleep
Rules and Constraints	Wish Upon a Star	Accountability

Notes:

Your Keystone Habit

Obvious:
Attractive:
Easy:
Satisfying:

Notes:

Notes:

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