



# Ecommerce Agency Secrets **From the Pros**

How today's top design & development agencies can thrive in the face of competition

# Introduction

You probably got into the agency world because you love doing creative, fulfilling work. There's no better feeling than helping someone bring their business to the next level.

If you're like many design and development agencies, though, you might find yourself stuck in the feast-or-famine cycle. One month you're working around the clock, overservicing clients with work you never bargained on; the next, things have slowed down, and you're worried about making payroll.

There are other challenges, too, like knowing how to move forward when the time comes to scale up your own


business, and finding and keeping top quality employees to help you realize your vision.

Sound familiar? If so, we're here to tell you from experience that it is possible to run a profitable agency, keep your cash flow steady, retain your staff, and make your clients happy.

We've brought together **four industry experts** who share their secrets for design and development agencies looking to scale, grow revenues, build retainers, benefit from agency partnerships, and confidently lead their team as they level up.

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What follows is the ultimate playbook, jam-packed with practical advice from **key influencers in the ecommerce partnership, successful agencies, and leadership coaches**. You'll learn how to:

- 
- 1  
**Step up your sales game**
  - 2  
**Choose the right clients**
  - 3  
**Be savvy about budgets**
  - 4  
**Start using paid discovery**
  - 5  
**Build agency retainers**
  - 6  
**Create profitable partnerships**
  - 7  
**Attract and retain quality talent**

**Along the way, our experts share their pro tips, so you'll benefit from their years of experience in the field. There are even free templates and checklists to get you started.**

# The Experts



**Rachel Jacobs**  
ecommerce Partnerships

Founder of Ecommerce Partnerships, Rachel Jacobs helps agency owners step away from the day-to-day of running their ecommerce agency so they can focus on growth. Having supported hundreds of ecommerce agencies in the last 18 months, Rachel has seen all the challenges that agencies face and has a proven track record of turning unprofitable agencies into success stories. Instead of being reliant on projects, Rachel works with agencies to implement value-based retainers and processes designed to increase profitability.



**Dan Sheard**  
Velstar

Managing Director of Velstar, Dan Sheard and his team of ecommerce experts help brands scale globally through the power of Shopify Plus, with clients including Avon, Public Desire, Linda Farrow, and BOYY. Having worked in ecommerce for many years, Dan has unparalleled experience when it comes to building a successful ecommerce agency with a formidable creative reputation.



**Shauna Moran**  
Operate Remote

Shauna Moran, founder of Operate Remote, helps remote and multi-location companies improve employee performance and engagement. Shauna is an accredited coach, consultant and emotional intelligence practitioner. She has unique experience in building and managing remote teams on an international level, coupled with an academic background in psychology and innovation management, and extensive research in remote-working strategies. Shauna's mission is to empower companies and leaders to create a productive, highly functional, effective, and engaged workforce, regardless of location, that they can scale well into the future, with confidence.



**Dasha Shakov**  
Rewind

Dasha Shakov is the Partnerships Manager at Rewind, the leading backup and recovery app for Shopify and BigCommerce. At Rewind, Dasha has worked with over 250 ecommerce agencies, cataloging the best practices they can adopt to add more value for clients and more revenue for their business. Before joining Rewind, Dasha developed a passion for marketing and business development in her own ecommerce brands. She now strives to help agencies of all sizes increase exposure and land new clients.

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# PART 1:

## **Secrets to Overcoming the Biggest Ecommerce Agency Challenges**

By Rachel Jacobs  
Ecommerce Partnerships



# Introduction

If you had to name the biggest challenges to your ecommerce design or development business, what would they be?

If you're like most other agencies out there, you're going to say something like "Clients who keep expanding the scope of work beyond what we agreed on!" Or, "Prospects that let me spend hours on a proposal and then shop it around, or ghost me just before signing." Maybe you'll point to customers that want big services on a small budget. In other words, people that may mean well, but end up stringing you along, eating your time, and eroding your profits.

If you're tired of all that, read on for secrets that will help you revamp your sales process to save time, screen out poor prospects, and pump up your conversion rate.



# SECRET #1:

## The time to stop scope creep is before you ever sign the contract

I used to think there were good clients and bad clients. I now understand that nine times out of ten, it's not bad clients but a bad client qualification process that drags an ecommerce agency down. This doesn't mean there aren't bad projects, it just means that a bad project usually starts from sales. The good news? If you can get the sales process right, you'll save your agency a ton of money and your team hours of heartache and stress!

I've worked directly with over 20 ecommerce agencies in the last year alone and advised hundreds more. I hear the same sales challenges over and over—there are not enough leads, prospects have ghosted us, clients don't have the budget. And then there's the main threat to agency profitability: scope creep.

Sales is actually a huge sticking point for agencies that don't have a documented sales process. Many agency owners are so bogged down with the day-to-day business that they have no time to effectively grow their agency.

If all of this sounds way too familiar, you need to get your sales qualification process in hand so that you can automate much of the process to save time, screen for clients that will be profitable, and develop a clear product offering that clients agree to before the work begins.

# SECRET #2:

## How to weed out bad prospects with a brilliant sales process

Most agencies are so eager to get contracts signed, it's often at the expense of due diligence and, more importantly, profit.

And yet, the number one cause of scope creep (which chips away at your profits) is a poor sales process. It's almost impossible to deliver a profitable project when it's been undersold in the first place. Before anyone signs on the dotted line, you first need to weed out the clients that aren't a good fit. To do that, you need a well-designed sales process.

Here's a list of my recommended steps, and the actions you need to take for each one.



# 8 Steps to Fix Your Sales Process

## Step 1:

### Qualify

Before you make the first call, qualify the potential client by email (budget, requirements, and timeline are a must).



#### **ACTION:**

**Create a qualification checklist to vet the client.**



**Here's an automated email template I recommend agencies use before scheduling a discovery call to get some of the key information:**

Thanks for taking the time to reach out to us! To make sure I understand what you are looking for, I'd love to get a little bit more information about your project:

- What are the biggest challenges/obstacles with your current website?
- What are your goals for the new website?
- What's your timeline?
- What's your budget?
- How'd you hear about us?

If you've already prepared some useful information, such as a Request for Proposal or scope of work, please feel free to attach it to your reply. Looking forward to your response!

#### **Pro Tip:**

You'll get much better results if you embed video in the email ("video prospecting"). Use free tools like [Vidyard](#) (my personal favorite) or [Loom](#) to introduce yourself and get some further information from the prospect.

#### **Pro Tip:**

Always give rough budget ranges to get an idea of what potential clients are willing to invest. This is a great way to disqualify leads that are not a good fit and then recommend them to other agencies.

## Step 2:

### Send a sales deck

This will give the client an opportunity to get to know more about your agency before you talk.

**ACTION:**  
Create a sales deck, ideally tailored to specific clients.



## Step 3:

### Discovery call

If a client seems promising after Steps 1 and 2, it's time for the discovery call. This is the first call you make to see if they are a good fit, and to further understand their requirements.



**ACTION:**  
Create a discovery call template.

#### Pro Tip:

Know your audience! The key to a solid qualification process is how you communicate with prospective clients. Most clients just want to be heard and understood, so **master the art of listening**. It sounds simple, but it's amazing how many recorded sales calls that I listen to are 75% pure sales pitch. You can't recommend a solution without properly understanding the client's problem. It's a bit like a doctor prescribing medication without even knowing what's wrong with you—that's malpractice!

# Step 4:

## Outline the solution and further qualify the budget

During the discovery call, when you have a better idea of client requirements, it's time to outline your solution.

### ACTION:

**Develop an outline of your agency's key offerings, so you can focus on diagnosing the clients' issues to see which solution best fits their requirements and budget.**



### Pro Tip:

At this point, don't spend too much time getting into the nitty gritty of what they expect (leave that for paid discovery—more about that later on!) Focus on diagnosing problems and presenting a remedy versus trying to close a deal as quickly as possible. Be a consultant! Provide tailored advice rather than selling them a prefab solution.

# Step 5:

## Set up the proposal call

At the end of the first call, book your next call, specifically to run through the proposal.

**ACTION:**  
Prepare an email template to send after calls to sum up next steps.



# Step 6:

## Be prepared for objections

On the proposal call, you'll have the opportunity to handle any objections in real time. You need to prepare your responses beforehand.

**ACTION:**  
Document key objections with ideal responses.



Consider the questions or objections you get asked on a regular basis and make sure you include those in your solution so you answer any questions before a prospect has time to even think about objections.

# Step 7:

## The proposal call

This is your second call. Run through the proposal with the client to explain your solution.

### ACTION:

**Tailor a proposal template in advance of the call.**



### Pro Tip:

Never email proposals! You need to be able to explain them in person or by phone. If you email them, the client will draw their own conclusions, and you won't get the opportunity to answer questions and handle objections in real time.

# Step 8:

## Send the proposal with contract

After the client has agreed to the proposal, send it along with a contract section immediately after to get a signature.

### ACTION:

**Ensure your contract section is transparent and sufficiently protects the agency.**



- ✓ **Step 1:** Qualify
- ✓ **Step 2:** Send a sales deck
- ✓ **Step 3:** Discovery call
- ✓ **Step 4:** Outline the solution and further qualify the budget
- ✓ **Step 5:** Set up the proposal call
- ✓ **Step 6:** Be prepared for objections
- ✓ **Step 7:** The proposal call
- ✓ **Step 8:** Send the proposal with contract

# SECRET #3:

## How to tell if a client's budget is big enough *before* your first call

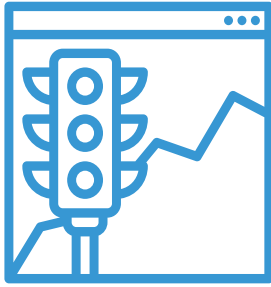
Something that baffles me is how many agencies do not get budgets from prospects, and then are surprised when they're ghosted or rejected based on budget.

Ideally, you need to know their budget before the initial discovery call (which can be automated).

Here's a little secret: there are ways to get an idea of what a prospect's budget might be before you commit time and resources to pursuing them. This is the formula I use:



**Traffic × average order value (AOV) × conversion rate (CR)**



### Pro Tip:

Estimate your client's web traffic using online traffic calculators. You can estimate a conversion rate based on industry norms. You can often find a particular industry's AOV's online as well.

These metrics will give a rough idea of what the client's monthly revenue is, so you can gauge what they might be willing to spend. In most cases, brands that are making less than \$50K per month will have much smaller budgets and be less willing to invest \$50K in a redesign or work with an agency long term.

On the other hand, brands that are turning over 6+ figures on a monthly basis might have no issue with those figures and often expect to work with agencies on an ongoing basis (although they rarely come out and say that up front!).

Now, the above is not always the case, but getting an idea of their revenue should give you some kind of indication as to what a brand might be willing to spend. As a general rule, you should always aim to discover the following:

**Budget:** What are they willing to invest or spend?

**Authority:** Are you dealing with the decision maker?

**Need:** What do they want—and more importantly—what do they need?

**Time:** When do they expect to see the end results?



# SECRET #4:

## How NOT to work for free (and get a foot in the door) with paid discovery

In some cases, you will speak to prospects who have no idea of budget (especially if you're not speaking to the decision-maker), in which case I recommend you immediately change your strategy.

Instead of trying to diagnose their problems, you instead shift your focus towards pitching paid discovery. Focus your efforts on selling paid discovery versus trying to sell projects; this sets the tone for the type of relationship you want to have with the client (retention).

This is known as a “foot-in-the-door” strategy. It's much easier to pitch a \$5K discovery workshop to help a prospect understand exactly what their requirements are than to sell a \$50K project when the details still aren't clear.

If you get a sense that a prospect isn't totally sure of the details, paid discovery should be your go-to. This is the best way to minimize scope creep and inevitably overservicing the client to the financial detriment of your agency.

And this brings up another one of the big issues agencies face—estimates. As anyone who runs or has worked at an agency will know, you can rarely trust developer estimates, as there are always unknowns that lead to the project running over budget. Project managers try their best to keep things on track but often end up making obviously out-of-scope requests just to appease the client. You're fighting a losing battle!

Paid discovery is essentially a fee-based proposal and is a great first step towards a long-lasting client relationship. Proposals require work—a paid discovery should clearly state what needs to be done, when it needs to be done, how it will be done, and what the process will look like.

In fact, starting with paid discovery often helps you win the deal faster and makes the project less likely to result in scope creep and overservicing. It also allows you to set the tone from the start and build trust with your client. If you get a bad vibe from the client at the discovery phase, it allows you to walk away and still get paid for the time invested.

# SECRET #5:

## How to create killer proposals that save you time and boost your conversion rate

Winning more business isn't just about having the right pricing. It's about getting your prospect to want to work with you. It's making them realize that with your agency as Alfred, they get to be Batman!

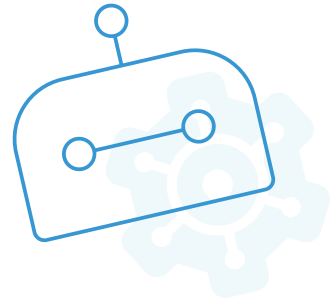
In order to get them to believe that, you need a proposal that knocks it out of the park.

But how do you do that? I like to think of a business proposal like a phone number—you have to have all the digits in the right order to get the desired result.

I recommended creating a master template and making it as comprehensive as possible. My own proposal template, which I'm going to share with you here, may seem detailed, but it will save you precious time in the long run. Each time you create a new proposal using the template, you can just delete the irrelevant pieces and do a quick search-and-replace for the customizable sections. When you get really efficient at creating proposals, you'll spend no more than 15 minutes per proposal. You can use the time you save for what's really important—growing your business.

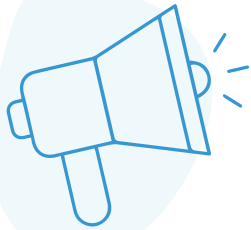
## Leverage technology to save time

Using technology to create and present your proposals allows your prospects to engage and interact with it. You can also use software that tracks open-rate and click-through rate, and even tie in automated marketing. Of course, old school proposals are still pretty awesome too!



## Upfront and in person

If you are at the proposal stage with a prospect, make them aware up front that your policy is to present the proposal in person, via phone, or via video conference. Why? Because presenting either in person or by video call allows you to explain the finer details, demonstrate your knowledge of project scope, and outline your strategy for helping the client overcome their problems, issues, and challenges.



It also provides you with the opportunity to overcome any objections that may arise along the way. **You must be willing to walk away from anyone who won't agree to this term because chances are if they won't make time to meet with you, they're not serious about working with you anyway.**

If that thought stopped your heart for a second, think about it this way:

No matter what happens,  
**never, ever** email proposals again!

## Getting the template right

The other major key to winning more proposals is arranging the pieces in the right order. Most agency proposals start out touting their own credentials and success stories. Resist this temptation! Remember, it's not about you and you're not the hero of this story (you're Alfred, after all). When you're walking a prospect through a proposal, all they care about is themselves, their problem, and how it's going to be solved.

You need to develop a crystal-clear plan that defines expectations on both sides. Something like: "This is exactly what we are promising you and this is exactly how we will do it." After you've presented the deliverables, essentially justifying your pricing before you present it, present the pricing and let the prospect respond first.



### Your master template should include, in this order

(don't worry, each part is explained below):

- ✓ Cover letter
- ✓ Executive summary
- ✓ List of deliverables and services
- ✓ Project summary and pricing
- ✓ Project timeline
- ✓ About us
- ✓ Contract section

## Cover letter

Don't just dive right into the strategy and the tactics. Set expectations upfront and entice the client to read more. Think of the opening of your proposal or RFP response as the cover letter of a job application.

You want this company to hire your team, but they need a more digestible summary of what you'll offer them and why you think they'll benefit from working with you.

This cover letter tells them who you are before they read about the services you offer. It also gives you the opportunity to remind them that they solicited the proposal they're about to read.

## Executive summary

The executive summary shouldn't just summarize what the proposal says, it should state what the prospect wants, where they want to go, and what they will need to get there.

You should also cover the research you did and the steps you took to pull together your recommendations. This document shows why the client should select your firm. State two obvious facts about the requester or the requester's needs upfront. These should be things that the client knows are true. By doing this first, the reader will be more receptive to the remaining points. This helps you present the information in a way that prevents the client from becoming defensive when reading your recommendations.

## List of deliverables and services

This is the heart of your proposal document. Categorize the proposal into different sections, such as creative, technology, etc. This will make it easy for the prospect to understand the different parts of the proposal and the different activities you recommend.

In each section, you should list out the specific deliverables and also indicate what is not included.

**This last part helps to prevent scope creep from the beginning**, and it also provides an upsell opportunity for clients who may want more.

Don't include pricing in this section. It will stop people from absorbing the information, and getting excited about the work you can do together. Instead, they'll just be thinking about dollar signs and comparing your pricing to another firm's price, regardless of what the solution you are recommending actually includes.

## Project summary and pricing

Add an itemized list with a price for each of the deliverables. This isn't designed to give your client the option to cherry-pick. Avoid asking clients to choose between too many different options. Provide a solid plan of what needs to be done, and what it will cost.

## Project timeline

Present the timeline for the project.

## About us

Save this part until the end. Honestly, the client won't care about you until they know what you can do for them and their company!

### Pro Tip:

Your potential client is receiving many responses at once, so always open the About Us section with the name of your company.

## Contract section

Include an agreement or contract in the proposal so that the client can sign as soon as possible. Don't make them ask you: where do I sign? Clients often go directly to the agreement or contract section of your proposal, so make sure it's clearly labelled and the signature lines are visible at the bottom.

## Everyone loves a surprise! (Except in a proposal.)

A proposal should be the result of numerous discussions with the prospective client. There should be no surprises in the price or the strategy that you are suggesting, and it should be seen as a written review of your conversations with your client.



## Handling objections

Have you ever felt like your proposal really knocked it out of the park, but it landed with a thud? You put loads of time, energy, and effort into a stellar proposal and received a lame response like, “Let me talk to my partner,” or “Let me see if we have the money.”

It happens to every agency at one time or another. Despite your best attempts, objections like these are an inevitable part of the sales process. But, objections are also a great way to continue the conversation. Instead of seeing an objection as a rejection, see it as an invitation to try harder and turn it into a “yes.”

A foolproof agency proposal should answer key questions before the prospect even asks them. By being transparent about your exact process, you build more trust with your prospects. Objections will still be raised, but in many cases can be flipped into something positive.

If your proposal answers 90% of the unasked questions, the salesperson only needs to focus on the final 10% to take it to the finish line. That’s when the salesperson needs to determine if this prospect has genuine concerns or is wasting your time.

Talk to the prospective client as if you’re partners. You’re not selling, you’re providing a service. Changing the conversation is how you’ll do away with the negative image of sales. Don’t go in thinking

**“I have to get this sale no matter what.”**

That’s how you end up with bad clients.

Not to mention that you’re not listening to their needs, or to see if they’re the right fit for your agency.


Remember: the meeting isn’t about you. It’s about the prospective client wanting what you offer. And you won’t know if you offer what they want unless you **listen**. Giving potential clients a chance to share how they feel and what they need makes them feel good and builds a sense of trust and security.

There is no such thing as a bad client, only a bad prospect or bad qualification process. If the prospect still has real concerns, the salesperson needs to do a better job of addressing them upfront. **However, if the prospect is wasting time, the qualification process has failed.** Which brings us to...





## SECRET #6:



### Three simple questions that will tell you if you're wasting your time

Let's look at two of the most common objections you'll hear from a prospect: "Send me more information" and "Let me think about it."

#### **"Send me more info"**

When your prospect says something like this, it means one of two things. Either something is missing, or you're wasting your time.

But how can you tell which it is? The answer is a question (well, three questions): **WHAT**, **WHEN**, and **WHY**. These three simple questions will tell you if you need to help your prospect overcome a hang-up, or if you're just wasting your time:



1.

## WHAT

information would you like me to send you?

This will tell you what might be missing from your proposal and what else they need to know before they can say yes. Sometimes, we're just too close to the business and don't realize we aren't sharing as much as necessary in order to make a decision easy for the prospect.



2.

## WHEN

would you like me to send the information?

Maybe they are trying to meet a specific deadline or achieve a time-sensitive goal. You want to follow up with the right information at the right time in order to increase your chances of working together.

3.

## WHY

do you need this additional information?

This will help you understand your prospect's specific goals. It might also reveal whether you're speaking to the right decision-maker or not. Maybe the person you're working with will say they need more information to pass along to their boss or business partner. You need to get in front of the right person or people to answer questions accurately.

If someone is wasting your time, they won't have good answers to these questions and they'll give you a generic response. But a good prospect—one who is genuinely interested in working with your agency—will request a very specific piece of information, and give you a timeline and a reason.

That's how you'll see if they're the real deal and whether they're worth your time. If this is still a legitimate prospect, agree to send the information and make sure to set up the next meeting right then and there.

## “Let me think about it”

You know how frustrating it is when you’ve spent hours trying to win a new client only to hear them say, “Let me think about it.” You’ve covered everything they need to know! What else could they possibly need to think about?

Again, you need to ask a few questions. If they’ve got a legitimate objection, you can actually prevent issues by gathering more information upfront.

Sometimes, prospects are reluctant to pull the trigger because they’ve had a bad experience with another agency. They may just be scared! The important thing to remember is they’re talking to you because they have an issue they need an agency to solve.



### Pro Tip:

The next time a potential client tries to blow you off based on a bad experience with another agency, ask them: “Have you ever had a bad experience at a restaurant?” After they answer yes, ask them: “Do you still eat out at other restaurants?”

# SECRET #7:

## Don't "Check In"—Follow Up!

Have you had prospects “go dark” after you send a proposal? How many useless check-in emails have you sent? When prospects are unresponsive, it's a waste of your valuable time (not to mention it's totally frustrating!).

You might have heard the saying “the fortune is in the follow-up.” That's true, but what they don't tell you is, there's a right way and a wrong way to follow up.

“

If you want effective and productive follow-up conversations, stop “checking in”!

”

“Checking in” is the biggest sales mistake you can make. It's the worst thing you can do with a client you've already successfully qualified and pitched. Checking in is what friends do. You aren't a friend—you are a service provider and authority in your field.

When you leave a check-in message, your prospect sees you as just another salesperson. To keep sales momentum alive, you need to **provide value in every interaction**, even if it's a quick follow-up call. That means you need to rethink your entire callback strategy.

## The prospect's three I's

If you want to turn more prospects into actual clients, start with understanding the prospect's "three I's"—Issue, Impact, and Importance. In your initial meeting, get really clear on their three I's. Define them by asking specific questions and taking note of the words they use to answer:

### **ISSUE:**

What's the biggest issue they're having?

### **IMPACT:**

What's its impact on their business?

### **IMPORTANCE:**

What's the importance of solving it?

Then, when you're calling to follow up on your proposal, you can use their words to better resonate and remind them of why they came to you in the first place. This strategy will create a sense of urgency and give them a reason to respond.

In most cases, your prospect has more than one proposal to review, so your follow-up call has to stand out from all the others. When you know the impact this problem is having, you can direct the conversation in a way that will strike a chord. Even if you're leaving a voice message, you can remind your prospect of the specific issue, impact, and importance, which will motivate them to take action.

You'll also be demonstrating your authority and level of commitment to helping them—and that is how you will turn more prospects into clients.

## Here are some powerful ways to follow up:

### Emphasize value

Your prospects will only want to deal with you because of the impact you can have on their business, so be sure to reiterate it. Remind them of how you can help. Say something like,

**“In our previous conversation you mentioned how important it was to get going so you could achieve the targets [eliminate redundancies, drive incremental growth, or whatever] that you need by year end. Let’s set up a time to talk so we can get you moving forward.”**



### Share insights

Your prospects want to work with someone who’s constantly thinking about how they can improve their business. Be that person! Say something like,



**“I’ve been thinking more about how we can help you increase sales [reduce costs, speed up productivity, etc.]. I thought you might be interested in what we did with XYZ Inc. when they were dealing with the same challenge. Do you have a few minutes for a quick conversation?”**

## Educate



Sometimes prospects are asking themselves if it makes sense to move forward or not. Keep giving them more reasons to make the change:

**“I know it’s a big decision to change the status quo. That’s why I thought you might be interested in this article [ROI calculator, case study, webinar, ebook] on relevant topic X. Let’s set up a time to talk through your questions.”**

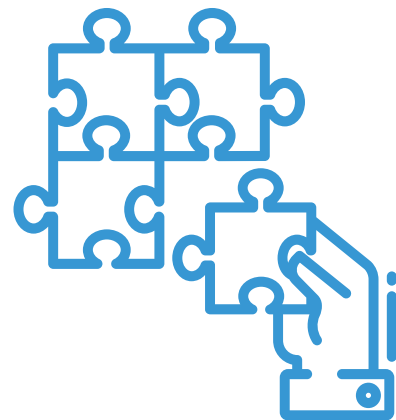
## Speak to their specific issue

If your prospect has a problem with lead generation, in your follow-up call you can say something like,

**“Hi, I’m following up on the proposal I sent you to help with your lead generation issue. I know this was important to solve in Q4 and that solving it could bring in an additional \$100,000 in revenue. Give me a call back so we can discuss accomplishing your goal.”**

You can see how a voicemail message like this might elicit a better response than just a general “checking in” email. You’re still providing value even though they already said they were interested.

When making follow-up calls, become an asset in the prospect’s decision process. If you’re serious about doing business with someone, you have to follow up in a strategic and purposeful manner.



## Conclusion

If you want to get out of the day-to-day grind of agency sales, it's essential to automate your sales process, which includes proposal templates, sales emails, sales decks, and any additional sales collateral. Make a list of what you have currently and outline what needs to be changed.

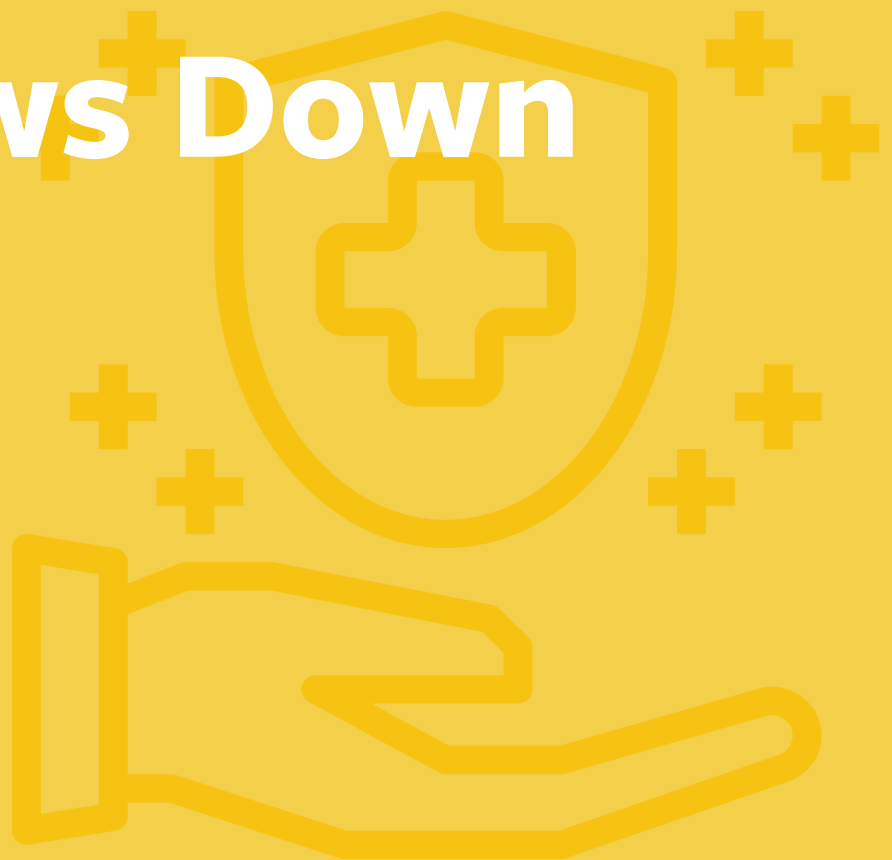
Remember, the sales process requires finesse! It should be a marathon, not a sprint. Avoid treating clients like they are on a conveyor belt—take the time up front to understand their requirements and figure out if they're actually a good fit for your team. Once you've established that, set the expectations of what it would be like for them to work with you—not the other way around.

An effective sales process is something that can easily be delegated to or picked up by someone in your team. While it requires a lot of work in the beginning, it will ensure your leads are properly qualified so that projects go through the delivery process with minimal scope creep and overservicing.



# PART 2:

## **Building a Safety Net in Case Work Slows Down**



## Introduction

Does it seem like you're either working around the clock or things are so slow you can't pay the electric bill?

If you're stuck in the feast-or-famine cycle, consider using agency retainers. Done right, they can help ensure you'll have a consistent volume of work. Then you can budget for the future, plan your team's time, and enjoy all the other benefits of regular income and billing processes!



## SECRET #8:

### **How to know what kind of agency retainer is right for you**

Working on retainer can have some pretty nice perks for your agency. Just think of that steady cash flow! It can also help strengthen your client relationships. Your administrative overhead drops when you don't have to pitch proposal after proposal to the same client.

And yet, agencies often struggle to create and sell retainer offerings. It's important to remember that retainers are an iterative process, and it's your job as an agency to provide the general framework. Over time, your offering will become more comprehensive, but it will always be a work in progress.

Retainers can be used for clients that need help with a project, clients that need ongoing assistance, and clients that need help with growth. Once you've decided that you want to pursue ongoing contracts with existing clients or new prospects, you have to decide...

## What kind of retainer is right for me?

Let's look at four common types of ecommerce agency retainer models.

### Hourly retainer

This is the simplest retainer model, in which a client agrees to pay a specified sum in advance to secure a number of hours over an agreed-upon timeframe. Generally speaking, you set aside those hours each month, and if the client doesn't use them, they lose them. Alternatively, you can agree in advance on a maximum number of unused hours that can be carried over.

#### Ideal For:

- ✓ Projects that are almost complete
- ✓ Client that requests additional hours beyond the original scope

### Project-based Retainer

This retainer model takes the total estimated cost for a project and splits it into a monthly fee for the estimated duration of the project. So, if a \$20K project will take 4 months, the client will be invoiced \$5K at the start of each month. It's important to attach expected deliverables for each payment so you have no issue justifying invoices. But remember to maintain focus on high-level deliverables, rather than individual tasks or hours spent.

#### Ideal For:

- ✓ Agencies that have a high volume of projects who want to guarantee consistent monthly income
- ✓ Agencies that want to be able to allocate their resources in advance

## Time-based Retainer

Time-based retainers are one of the most common kinds of retainers agencies use. They usually involve charging time out at daily, weekly, or monthly rates, which allows agencies to schedule their resources in advance. It also provides financial stability, which is essential to scaling an agency.

### Ideal For:

- ✓ Agencies that want to scale their team
- ✓ Agencies that want predictable cash flow each month

## Value-based retainer

Heads up! Value-based retainers are one of the most difficult retainers to get right. Ultimately, you are charging a monthly fee for a projected value that you can deliver. The focus for value-based retainers is how much value a set of deliverables will bring to the client's business.

A great way to implement a value-based retainer is to propose a pre-set retainer according to the client's main area of interest, such as conversion rate optimization (CRO) or pay per click (PPC). Submit a proposal that outlines value-based deliverables and a monthly fee that you feel justifies your efforts.

### Ideal For:

- ✓ Agencies that are confident in their expertise
- ✓ Agencies that are comfortable offering a proactive approach to retainers

### Pro Tip:

I like to use a 3-step process for value-based retainers: (1) analyze, (2) implement, and (3) optimize. This provides the framework for a 3-month retainer—the perfect amount of time to build trust, without asking for too much of a commitment from the client. After the 3-month retainer is complete, use the data to provide recommendations for a 6- to 12-month retainer agreement.

It's imperative that deliverables are clear in advance so clients know what to expect and can see the value that you bring to their team.

# SECRET #9:

## How to build your retainer model from the ground up

Once you know what kind of retainer you want, you can begin to craft a custom retainer model tailored perfectly to your agency.

It's actually pretty simple! If you're not quite sure where to start, begin by deciding on the length of time the retainer will last. It should be a minimum of 3 months. Start by selling 3 months, and after you've proven your worth you can lock in for 6 or 12 more months.

Next, make a list of the major services you get asked for on a regular basis.

Lean on your team to create a list of subtasks involved in each key service and the time they require. Once you have that information, it's a matter of fleshing out the details and presenting it in a way that represents value to the client.

Focus on tasks that you can measure with objective data. Take, for example, improving site speed. On average, improving load speed by 1 second can [increase conversion by 7%](#). You can tell your client, "Your website has a load time of 7 seconds. It should be at 3 seconds. If we reduce the load time by 4 seconds, it'll improve your conversion by 21%."

Or, consider email marketing. On average, 25% to 35% (depending on the industry standard) of your client's revenue should come from email marketing. If it's lower than 25% (or the industry standard), there's an opportunity to do an email retainer with your client. You can project how much revenue they'll earn if email starts to bring in 25% to 35% of revenue and base your retainer on that.

By listing tasks that can be measured objectively, you can convincingly prove their effectiveness.

Ultimately, clients care about their bottom line, so your focus needs to be on tasks that will boost their profits.

You now have a master retainer template of all of your services, which you can customize for each prospect. Your account manager should update the master retainer template on a monthly basis and review it with the team quarterly.



Once you have a clear outline of what you are including in each retainer offering and what kind of retainer will work best for you, it's up to your sales team to start selling those retainers to old and new clients.

### Pro Tip:

Your retainers should be fairly high-level to avoid setting unrealistic expectations. Remember, once you put something in writing, your clients will hold you accountable! It's your responsibility to ensure that retainers are as profitable as possible. If you try to squeeze too many tasks into a limited budget, you're doomed to fail. Retainers are about quality, not quantity.

Clients should not be getting free services. Measure your retainer profitability according to the volume of **billable** hours. If a client is paying \$2,500 per month and your standard hourly rate is \$100 per hour, you can give them 25 hours each month (this is an hourly retainer). But remember, this includes all time spent by your whole team. Say your account manager calls the client for an hour twice a month, and brings two specialists in on each call. That's \$600 of your agency's time spent on calls! If you did this for 10 clients, you would lose \$6,000. Unless your clients are aware and have agreed that the calls would be taken from their monthly allowance, it's going to be tough to get compensation for this time.

You can see that it's critical to minimize the amount of nonbillable work, especially if you are working on a value-based retainer rather than an hourly one. You need to know what services you're offering, and how long they take in terms of human hours.

## Retainer-first or project-first approach: which is best?

### Retainer-First Approach

When a client has an ongoing need for your services, such as email marketing, get them on retainer straightaway. Retainers are a bit like a marriage; it's a big commitment when you've only just met! Suggesting a more limited version of a retainer is a great way to start "dating" before saying yes to a 6- or 12-month contract. For instance, you could suggest a 3-month trial. Or, if a client wants to take an even smaller step towards committing to a retainer, recommend an audit. This is the perfect way to under-promise and over-deliver—knock their socks off by going the extra mile!



### Quarterly Reviews

Another great way to ensure clients are always reminded of the value your agency brings is to have quarterly reviews. It can be difficult to prove results on a month-by-month basis, but when compared to the previous quarter, the results are usually more tangible.

### Project-First Approach

When a client has a specific project they need help with, use the project-first approach: concentrate on the immediate need and pitch the retainer further down the road.

#### Pro Tip:

Rather than using a client's entire budget to complete a one-time project, you may want to recommend an approach that I call "MVP + Iterate":

#### 1.

Use a small portion of the budget to cover an MVP (minimum viable product) service offering that addresses just the "essential" tasks of the project.

#### 2.

Spread out the remaining budget over the next few months (depending on how big the budget is) to take care of any "nice-to-have" tasks, plus some growth-focused tasks.

This approach will give you extra time to demonstrate your value to the client and to build a rapport with their team.



# SECRET #10:

## How to perfectly pitch your retainer

Anyone who has worked in an agency knows that clients rarely know how to break their data down into actionable tasks. This is a perfect opportunity for you to take a proactive approach by anticipating their needs and recommending solutions.

- ✓ What low-hanging fruit can I address immediately to prove my value?
- ✓ Where are the client's biggest growth opportunities?
- ✓ Where can I provide the most value to their business?
- ✓ What does the data tell me regarding where they need help?
- ✓ What are my recommendations worth to their bottom line?



## When's the best time to pitch?

Retainers should be part of the conversation from the beginning, so you can set your expectations from the start. However, if a project is riddled with scope creep (either because of poor scoping during the sales process or because a client has unrealistic expectations), you have the perfect opportunity to understand what their challenges are, outside the scope of the current project.

The next time to pitch is when you're coming down to the end of a project (I recommend at 75% complete). This is the stage to discuss what the client's next steps are and how you can help them.

### Pro Tip:

In addition to offering clients a limited warranty to fix any bugs (I recommend 30 to 60 days, max), provide recommendations tailored to their needs. Waiting for clients to come back to you when they need help turns you into an ad-hoc service, rather than a valuable part of their team.

## Find the value and communicate it

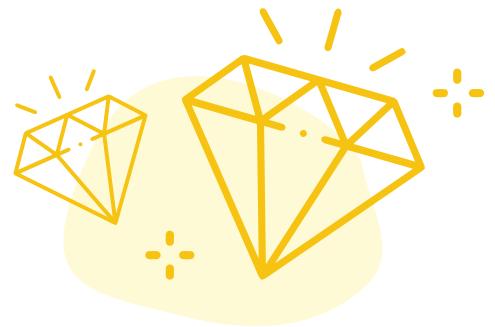
The goal is to position your agency as a strategic partner—a group of experts dedicated to leveraging opportunities to grow their business. It's the agency's responsibility to create these opportunities, not the client's!

### Pro Tip:

When speaking to prospects, quickly figure out where they're leaving money on the table and position your services against that. For example, if their mobile traffic is considerably higher than desktop, but the conversion rate is lower, you know you can help. Look at their metrics and compare them against work you've done with other clients. If their mobile conversion rate is 0.6% and the average conversion rate for sites you've worked on is 2.9%, it's pretty easy to work out how much money that increase would mean for their business.

### Pro Tip:

Make sure you've audited the client's website and data to present custom solutions and pinpoint any issues before they become a problem. Communicate the value, be proactive, and show confidence!



**The key to pitching retainers is how well you communicate the value.**

- ✓ Make the value to the client clear and obvious
- ✓ Identify some of their current pains and desires
- ✓ Offer examples of tasks that you can take care of
- ✓ Make it easy for them to take the next step

## Here's a template you can repurpose for your agency:

Hey {NAME},

I was checking up on your business and noticed that {OUTLINE GROWTH OPPORTUNITIES}. I've outlined a few tried and tested strategies and I'd love to help you {SUGGEST EXPECTED OUTCOME}.

I have a few limited spaces in my schedule to offer this kind of ongoing support, and since we {DETAIL OF PREVIOUS PROJECT}, I wanted to extend this offer to you.

If you're interested, I have a few options, depending on what suits you best:  
{PRICING OPTION 1} {PRICING OPTION 2} {PRICING OPTION 3}

Some things we could do with this time include: {LIST COMMON PAIN POINTS, GOALS, RESULTS, EXPECTED OUTCOMES} (e.g. we could focus on building out your email campaigns, create a social media strategy, etc.)

I only have {NUMBER} spots available for next month, so please let me know if this is something you're interested in, and we'll jump on a call to discuss your requirements further.



**Then schedule the call, and don't forget to add a calendar-booking CTA.**

### Pro Tip:

Integrate a tool like Calendly with your calendar to set up virtual consultations with clients.

# SECRET #11:

## Top 10 PRO tips for winning retainers

Pssst....here are the best-kept pro secrets for making your retainers uber competitive:

### 1. Offer more services

An easy way to scale retainers with current clients is to offer more services. Take a look at all the services you offer your clients and document them. The more you can itemize this list of services, the better the chance you have of upselling your services. This creates a virtual retainer shopping list that you can present to all your clients.

### 2. Use pricing option psychology

Research shows that having [three pricing options](#) is the most effective at converting clients. Option one should be your entry level or “basic” offering (around \$1K/month). Option three, your “premium” offering, should present greater value for a higher price (around \$3K+/month). But the second option is where psychology steps in!

Option one should have fewer services than the client asked for, while option three should cost more than the budget they agreed on. That leaves option two, your “intermediate” offering (\$2.5K/month)! Option two should be slightly more affordable than your most expensive option, but significantly more expensive than your basic plan.

### 3. Highlight your unique selling proposition

If you want to stand out to your prospect, you need to clearly communicate what makes you different from your competitors. Maybe it's a white-glove service. Maybe your results speak for themselves!

Focus on the value you provide, rather than listing the services you offer.

### 4. Embrace negative reinforcement

Rather than telling brands how much money you can make them, tell them how much money **they stand to lose** if they don't take action. If you can back this up with data, then you're on track for a new client. This is easy to do if you're upselling additional services to a current client because you can use their numbers to make data-driven recommendations.

### 5. Showcase your skills

Make sure you have case studies and testimonials that provide social proof of how good you are. Most brands are happy to provide some feedback, so long as you're prepared to do the leg work and actually create the template.

### 6. Manage client expectations

Outlining what you expect to achieve for your client is essential to a successful retainer partnership. Aligning their expectations with individual objectives will boost their impression of how much value your agency brings. It also makes it easier to justify your monthly costs and provides the perfect opportunity to recommend additional services.

7.

## **Make a good impression —every time**

First impressions count! So do second impressions. And third... Basically, it's always important to make a good impression on your clients, particularly when money's involved. Make sure you put effort into all communications with prospective clients. Don't take too long to follow up with your recommendations, report, or proposal.

Personalization always impresses. Provide recommendations tailored to their data. Showcase your expertise by auditing their growth strategies so they can see how you intend to help them grow. Personalizing your services according to their needs is key to landing retainers.

8.

## **Use data-driven proof**

It's essential to harness data to prove how much value you can bring to the relationship, which means you need to track and measure all relevant client metrics. When selling retainers, data that show a higher ROI will help you justify a higher cost.

9.

## **Know your industry**

Before you decide on which services to offer, you need to make sure you know your audience, the industry, and your competition. Find out what services other agencies are not offering, and include them in your offering as leverage to encourage clients to spend their money with your agency.

10.

## **Pick up the phone**

When you're in a busy agency, automation and short cuts are often the go-to solutions when it comes to responding to queries. But agencies that go to the trouble of actually picking up the phone and speaking to a prospect have a significantly greater chance of landing them as a client.

## Conclusion

When you're ready to stabilize your revenues so that you can plan and allocate your resources effectively, agency retainers can help. Determine what type of retainer will work best for you, create a master template of your offerings, and then go for it.

It's a bit of work up front, but you'll thank yourself when the lights stay on!



# PART 3:

## Leading the Way to Growth

By Shauna Moran,  
Operate Remote





## Introduction

Agencies that want to scale up no longer need founders—they need leaders.

You were an awesome founder! Now it's time to take off that hat. From here on, your ability to lead is what's going to grow your agency. It's going to require a mindset shift on your part. Growth, both personal and corporate, will always involve a little pain.

But it's going to be worth it.

## SECRET #12:

### How to move from founder to leader

There comes a time as a business owner when you stop, look around and wonder, “When the heck did my team get so big?”

As an entrepreneur, you had a concept. As a founder, you worked very hard to make that concept a reality. You generated revenue by obtaining clients and sourcing the best talent to help you scale and grow.

That “founder mentality” was absolutely critical in getting you where you are today, but to get you to where you want to be five years from now, you’ll need to change your mindset once again. You’ll need to become a leader.

The most significant influencers of an organization’s culture are its leaders, so it is not surprising that studies by [the Hay Group](#) and others show that leadership behavior affects bottom-line performance by up to 30%. So here are my tips for making the transition from founder to leader.

“

Studies show that leadership behavior affects bottom line performance by up to 30%.

”

# Letting go

Often, when I work with the founder of a business looking to scale, I can see they're having a hard time letting go. And no wonder! Over the years, they've poured everything they have into their agency and into achieving their success. All those late nights, early mornings, brutal pushes to meet deadlines, and constant hustle have paid off up to now. But the truth is, doing those same activities with the same mindset will keep those founders in exactly the same place—it won't get them to the next five years.



At a certain point, if you're going to move forward, you need to shift gears from founder to leader.



But what does that look like?

When people work with a “founder’s mentality,” they’re usually working at max capacity. They’re struggling with time management because they’re involved in so many different projects within the business, maybe even on a micro level. A shortage of time and an excess of fear drive them into “command and control” mode. Although they have a great team around them, they feel they need to be involved in just about every aspect of the day-to-day business—just in case! They fear to let go of control, even just a little.

Ask your team if this is you. They’ll tell you—in fact, they probably already have! If this is you, consider that there comes a moment when we all have to let go. If you want your business to grow, you will have to loosen the grip, let go, and lead the way.

# Delegating

One thing leaders have to do, whether it comes naturally or not, is delegate. Once you have a team around you that produces high-quality work, it's time to trust them! Delegation is an art that requires the drive to improve, open communication lines between teams, and consistent performance management.

## When you delegate



Set yourself and your team up for success with effective communication



Incorporate coaching strategies into your leadership style



Support your team in carrying out this work

# Evolving beyond self-interest

To earn the title of leader, you must evolve beyond seeking your own interests, status, and recognition. Your success will now be defined by how successful your team is. It's your job to remove the blocks to their success—so they can thrive.



Focus on creating structures within the business to set the team up for success



Develop communication strategies and processes to ensure transparency



Implement time management structures to ensure you're working smarter

# Developing a compelling vision

Human capital is now widely valued as one of the most important contributors to the company's sustainable performance and growth. To attract and retain quality employees, a team needs a strong vision, and that starts with you embracing a visionary leadership style.

Title, salary, and benefits package are just not enough anymore. Employees now expect a company to also have a clear and compelling vision—a reason for doing what they do. When this is missing, it leads to a lack of engagement, productivity, and eventually, staff churn.

So, how do you ensure that vision, motivation, and mission are powerfully, effectively, and deliberately considered every day in the work your team does?

- ✓ Clearly define your company vision and mission
- ✓ Ensure your leadership team are aligned on how that vision is brought into daily/weekly/team/online interactions
- ✓ Create company vision educational and engagement strategies at every stage of the employee journey—from hiring to onboarding to performance management
- ✓ Lead by example—walk the talk, and others will follow

## Going global

When your vision is compelling and your culture is thriving, you open up other possibilities for your agency, such as hiring remote employees. One of the most common challenges agencies face is sourcing talent in a specific location. When you hire remotely, you have access to a global pool of talent.

### Pro Tip:

As a business owner, you need to ensure you mitigate the risks of hiring remotely and make the transition as smooth and effective as possible for the new hire.

# Coaching

One of the most effective ways you can develop as a leader is by developing a leadership style that uses coaching. Coaching is, in essence, unlocking people's potential to maximize their performance.

When you begin to use a coaching leadership style, the culture of your organization will start to change. The old idea of hierarchy gives way to partnership and collaboration. Blame gives way to honest evaluation and learning, external motivations are replaced by self-motivation,

protective barriers fall as teams build, change is no longer forced but welcomed, and satisfying the boss becomes pleasing the customer. Short-term, fire-fighting reactions become strategic thinking.

Instead of you being the problem solver, you're now empowering your team to find the solutions. Not only does developing their problem-solving abilities save you time and energy, it helps to engage your team members through professional and personal development.

## Developing emotional intelligence

One last but critical aspect of transitioning to a leader is developing your soft skills, aka emotional intelligence (EI).

### Intelligence

[ in-**tel**-i-juhns]

Noun

- 1 A set of **emotional and social skills** that collectively establish how well we **perceive and express ourselves**, develop and maintain **social relationships, cope with challenges**, and **use emotional information** in an effective and meaningful way.

What separates good performers from great performers in the workplace? While IQ and technical savvy both contribute to success, studies have shown that [high EI is what truly sets you apart](#). An evolving body of research is showing that individuals (from interns to managers) with higher EI are better equipped to work cohesively within teams, deal with change more effectively, and manage stress—thus enabling them to pursue business objectives more efficiently.

Skills like emotional expression, empathy, decision making, and nurturing interpersonal relationships are all vital skills that as a leader, you should be actively developing—not only within yourself but in your team around you. The good news is, unlike IQ, EI is something that you can improve with training.



## Conclusion

Levelling up your organization requires bold leadership. If you want to scale, generate more revenue and reap the other benefits of growth, you have to grow personally as well. Making the move from founder to leader requires a pretty big mindset shift, but you've done that before.

It's time to start trusting that your team has got this! It's time to develop your vision, your staff, and your own EI so that you can blaze the trail to the next exciting phase of your agency's life.

Are you ready?



# PART 4:

## **Using Tech Partnerships to Strengthen your Agency**

By Dasha Shakov,  
Rewind





## Introduction

As the ecommerce ecosystem grows, more and more agency partner programs emerge. You might have already come across a few programs that piqued your interest. Maybe you've heard some of the reasons why your agency should start partnering with tech companies. If not, you're about to find out!

My goal is to help answer some of the questions you might have: Are agency partner programs worth joining? Where do I start? How do I know which partner program is right for me? How do I pitch solutions to my clients without feeling sleazy?

Let's get started.

# SECRET #13:

## The four things tech partnerships can do for your agency

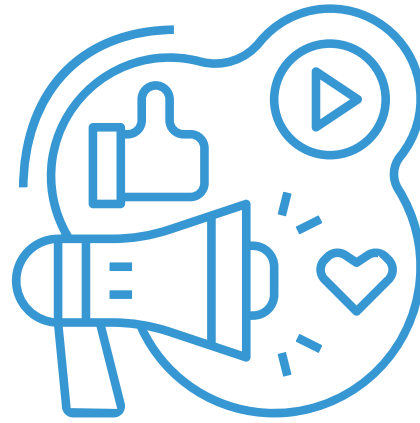
Are agency partner programs worth joining? The short answer is yes – they can be very beneficial and lucrative. The reasons to join an agency partner program are plentiful. No two programs are the same, but there is a lot of overlap in the benefits they offer, which I'm happy to share with you. Here are the four main things agency partnerships can do for you:

1.

### Add a revenue stream



Most agency partner programs offer financial incentives to agencies for recommending their solution. Each time your recommendation translates into a paying customer, you earn a monetary bonus. Sometimes, you receive an ongoing percentage of the plan your client subscribes to. Other times, you're awarded a one-time payment for your successful recommendation. Rewind's one-time payments range from \$25 to \$1,000, depending on the plan an agency's client subscribes to. Making money for recommendations you'd have made anyway is an easy way to add a new revenue stream. I compare it to collecting \$200 every time you pass "Go" in Monopoly.



## 2.

### Increase exposure

The more recommendations you make, the faster your agency's "tier" will grow. Many agency partner programs tier their agencies (e.g., Bronze, Silver, Gold). Top-tier agencies unlock more incentives, so striving to level-up is never a bad idea. As your tier grows, your partner's efforts to market your services should as well. Many partner programs showcase top partners on their website's partner directory. Moreover, top agency partners are included in co-marketing activities. A strong relationship with a partner often means blog posts, case studies, webinars, newsletters, social media posts, events, and more. Agency partner programs usually have dedicated Partner Marketing Managers who work with top agencies on various marketing initiatives to increase exposure. These campaigns can expand your visibility and result in a larger network to source new clients.

## Partner Marketing Manager

[ **pahrt**-ner **mahr**-ki-ting **man**-i-jer]

Noun

- 1 a dedicated professional at the tech partner firm that collaborates with agencies on marketing initiatives to increase exposure and expand client networks.

3.

## Build credibility

Clients expect a certain degree of tech solution domain expertise from their agency. You should expect to invest time in learning the intricacies of the solution you're recommending. Taking a training course to become accredited as a certified partner is pretty standard. Most agency partner programs provide trust badges to their certified partners. As a top-tier partner, you can gain early access to tech partners' newest features and integrations. You can use these insights to wow your clients and build credibility.

### Pro Tip:

Get a leg up on the competition: display your partner badges on your website to position yourself as a domain expert.

2.

## Take pressure off of your agency

Many agency partner programs offer agencies a dedicated Partner Manager. Partner managers are there to answer any questions from the agency or its clients. Building a relationship with your partner manager enables you to hand off clients interested in learning more about a tech solution, the price, and getting started. Instead of setting up new tech solutions for clients, you can spend the time growing your business.

## Partner Manager

[ **pahrt**-ner **man**-i-jer]

Noun

- 1 a professional at the tech partner firm who liaises with agencies and their clients; helps agencies convert leads into paying customers.

# SECRET #14:

## How to recommend your partners to your clients without feeling sleazy

Some agencies shy away from agency partner programs because of their fear of appearing “sales-y.” But you really don’t need to feel that way.

It’s important to understand that your clients are already using technology—a lot of it! The [average Shopify merchant](#) uses six integrated apps in their ecommerce solutions.

Whether or not you’re making recommendations, your clients will end up using technology to grow their business. By suggesting apps you’ve vetted, you’re actually helping your clients succeed.

Many agency partner programs offer training to familiarize agencies with their technology. Take advantage of these opportunities to gain a deeper understanding of the solution. This will enable you to have meaningful conversations with your clients and show your domain expertise.

### Pro Tip:

Never recommend a tool unless



**You’ve tested it.**



**You would use it yourself.**

Be confident in your recommendation and tailor it to your client’s needs and budget. Remember that your recommendation is adding value for your client. It’s increasing their satisfaction with your service.

# SECRET #15:

## How to pick the perfect partners

It's easy to get overwhelmed by the sheer number of agency partner programs. The good news is, it's quite easy to get started.

The key is to start small. Begin by auditing the tools you're already suggesting to clients. Think of the solutions that arise during your conversations with clients. Compile a list, and check if those tools have agency partner programs. Consider asking questions during your discovery calls to identify future opportunities for recommendations. For example, your client might be interested in loyalty programs or email marketing.

Pay attention to their needs and document them along the way. Remember: each recommendation is an opportunity for your agency to add a new revenue stream, climb the ranks of a partner program, and, most importantly, enhance your agency-client relationship.

## The perfect partner program checklist

How do you know if an agency partner program is worth your time investment? Here's a checklist of partner perks that make an agency partner program worthwhile. Make sure your potential partners offer these:

- ☒ Dedicated partner manager
- ☒ Certification process
- ☒ Agency partner resources
- ☒ Financial incentives
- ☒ Co-marketing opportunities

# Proven agency partner programs you can join today



## Rewind

### What it does

Effortless automatic backups and recovery for Shopify and BigCommerce stores of all sizes. Protects the data that drives an ecom business.

### Partner Program Offerings

<https://rewind.io/agency-partners/>

“Get rewarded for educating your clients about website backups. Join our Agency Partner Program for access to resources, support, and revenue sharing.”

“Earn up to \$1,000 per referral, gain access to partner support, training, co-marketing opportunities, and more.”



## Shogun

### What it does

Powerful page builder for ecommerce teams and agencies. Integrates with Shopify, BigCommerce, Magento, and Salesforce Commerce Cloud.

### Partner Program Offerings

<https://getshogun.com/agency-partners>

“Design and launch your clients’ ecommerce sites faster than before without sacrificing quality or page speed. With Shogun’s help, there’s no limit to what you can build to help your clients scale their businesses.”

“Gain access to a community of over 10,000 ecommerce clients and enjoy exclusive perks like priority support and training to help grow your agency.”





## Smile

### What it does

Build loyalty with points, referrals, & retention marketing.

### Partner Program Offerings

<https://smile.io/partners>

“For agencies who want to support their clients’ growth by helping them build a strong brand community through our rewards platform.”

“Get exclusive access to beta features, revenue sharing, partner support, and more.”



## Subscriptions by ReCharge

### What it does

Launch and scale your subscription and recurring business.

### Partner Program Offerings

<https://rechargepayments.com/partners>

“Just as we’re passionate about creating the best recurring billing platform, we’re equally passionate about empowering and supporting our agency partners. Our partners team is here to give you the guidance, support, and training to help your clients grow and succeed.”

“Gain access to 1-on-1 training and development support, receive early access to our latest features and integrations, and earn a 10% revenue share for each store.”



**Alvara**

## What it does

Sales and use tax solutions for retailers. Connect Avalara to your ERP, POS, ecommerce, billing, and other business systems for tax solutions that work where you work.

## Partner Program Offerings

<https://www.avalara.com/us/en/community/partners/partner-portal/marketing-and-sales-partners.html>

“By partnering with Avalara, you can strengthen your customer relationships while you add value as their go-to for all things transaction tax and compliance. This type of competitive advantage increases customer loyalty and reduces churn.

Avalara partners are rewarded by our programs and receive benefits for referring customers who opt to work with us directly.”

“Two ways to partner:

**Refer** Avalara products and earn commission

**Implement** Avalara solutions for your customers”



**Bold Commerce**

## What it does

An app for everything ecommerce.

Unleash the full potential of your store with Bold’s plug-and-play apps.

## Partner Program Offerings

<https://boldcommerce.com/partners>

“Bold will give you the tools you need to create a better experience for your customers. We’ll provide you with API documentation and development support to make our apps compatible with the software you’re using and the goals you want to achieve.”

“You and your clients will receive priority support from our industry-leading Merchant Success team.”

“Earn recurring revenue from every one of our apps you install on your clients’ stores. We offer a competitive revenue share on recurring app fees and transaction fees from apps you install on your clients’ stores.”

## Conclusion

Remember that your goal when joining an agency partner program is to build a mutually beneficial relationship to help your business prosper. Agency partner programs can be an amazing way to add a revenue stream, unlock new opportunities for marketing, and enhance relationships with your clients.

# PART 5:

## **Driving Agency Success by Attracting and Retaining Talent**

By Dan Sheard,  
Velstar

## Introduction

When I started Velstar back in 2016, there were a lot of factors I had to consider. I needed a solid and actionable business plan, a marketing strategy designed to reach prospects, and a business location that was close by. But there was one thing more important than all of these: employees who were committed to helping me achieve my business goals and driving Velstar's success.

It's no secret that design and development agencies operate in a highly competitive landscape. In particular, the ecommerce industry is highly saturated. Since many agencies offer essentially the same services, it's an agency's employees that make it stand out. Because of this, I made it my mission to attract and retain the very best people at Velstar.

Talent is the single most important ingredient for agency success. When you hire great people, exceptional things happen: agency efficiency improves and client success skyrockets. Once you've found these quality people, you need to be able to keep them!

To help you find and keep great employees, I've outlined my top three agency secrets for building a strong team that will ensure your business thrives despite the competition.

# SECRET #16:

## How to use strategic onboarding to drive your team's success

Onboarding is the process of familiarizing a new employee with your company. In the past, onboarding happened on the new hire's first day, and mainly involved sitting them down with HR to sign forms, explaining their benefits, and showing them the lunch room.

If your onboarding process still looks like this, you're missing a golden opportunity!

Onboarding is not just something to get out of the way on the morning of Day 1. It's the chance to begin forging a lasting relationship with the new hire by letting them know they are a valued part of your team. It's your first chance to give them a sense of belonging and engagement.

“Onboarding begins before Day 1, and it doesn't simply stop once the paperwork has been signed.”

Onboarding is an integral and ongoing part of the employee lifecycle; their experience at this critical point can determine whether they stay with your company for a few months, or not at all. If you put the effort in now, you can increase engagement and retain the best people.

Here are a few simple steps for strategic onboarding to drive your agency's success.

1.

## Announce it



So you've hired someone perfectly suited to an open role in your business—don't keep it quiet! Announce it to the rest of your team. Include information about why you hired this person, who they are, and what they'll be doing. This will keep your team in the loop on business changes and help them to understand how they can connect with the new employee.

2.

## Get organized early

Prior to your new hire's start date, it's imperative that you keep in regular contact. Send them any paperwork that can be completed in advance, and include them in communications relating to their first day. This is an excellent opportunity to build a sense of community and belonging before they've officially started at your agency.

### Pro Tip:

First impressions count, so have the new employee's equipment set up and ready to go, including their laptop, email address, Slack account, and phone equipment if needed. Make sure all documentation and meetings for their first few weeks are scheduled in their calendar.

3.

## Discuss objectives and expectations

On the new employee's first day, have a one-on-one orientation session with them to run through company policies and procedures. This is the perfect time to communicate your agency's goals.

### Pro Tip:

Always try to make the one-on-one as personal as possible. Inform new hires about the projects you're working on, show them where they fit into the agency, and outline the tasks they'll be taking on.

I can't stress enough how important this is, so make sure you're consistent and show up for the scheduled one-on-ones. The worst thing you can do to a new hire is to forget about them and let them fall through the administrative cracks.

## 4. Encourage team socializing

When people feel they're making valuable connections with their team members, chances are they'll stick around. So, it's important that your new employee feels fully integrated into your team.

As well as your own introductory meeting with the new employee, set up individual meetings with the team members they'll be working with. Be sure to make these meetings as social as possible! Arrange a team lunch, coffee dates, or even a drink at the local bar. Social events like these can give your new employee an understanding of both work and non-work culture and make them feel a part of the team.

Of course, in the world of COVID-19, the personal touch can be tricky! There are many video conferencing tools available to help you bring office activities to your new employee's home.

In my experience, if the team is having fun and fully immersed in the company culture, they'll embrace your mission and connect with it both personally and professionally.

## 5. Ensure a constant flow of communication

Onboarding needs to be an ongoing process. You should be checking in on your new employee regularly to ensure they're comfortable, happy, and engaged. Communication platforms like Slack are really great ways to do this.

### Pro Tip:

If your team is working remotely, internal communication is even more critical. Try hosting daily Zoom stand-up calls with the whole team: every morning at 9 am, do a 15-minute catch up so each team member knows exactly what they're working on that day and can raise any additional questions or needs they might have. Also, it's a great way to motivate your team, keep the team updated on what's happening at the agency, and give new members a bigger picture of how your agency works.

At the end of your employee's first month, take time to sit down with them and check in on how they're finding things. At this stage you should acknowledge their early contributions, so they know they're contributing to the agency's success. Start to map out targets and goals for them to work towards.

It's crucial to have consistent and constant communication with your team members directly to optimize their job performance and satisfaction.



# SECRET #17:

## Employee training is about more than training!

The landscape of ecommerce is ever changing. If you want your agency to be competitive, you have to stay current with the latest innovations and trends. This is where your employees come in.

When your staff have all the knowledge, skills, and up-to-the-minute training they need, your business will benefit massively. Employees will be able to do their job more efficiently and competently. Ultimately, they will give your clients better service.

What's more, employees are far more likely to be engaged at work when agencies offer [learning and development](#) opportunities. In fact,



Learning and development are the most important benefits they consider when deciding where to work.



so implementing a training program is also about attracting quality staff, and increasing their engagement. It really is a no-brainer!

But...how do you effectively implement good training in an agency? How do you build a work culture where people are interested in learning and training initiatives?

Here are my top three tips for effective training to empower your employees and guarantee they'll want to learn.

## 1. Invest in individual training

Even before Day 1 at your agency, an employee should be informed of the training budget available and be encouraged to use it.

Once they've started with you, ask them how they're getting on, what they want to learn, and if there's anything they're struggling with. From there, you can identify gaps in their knowledge and create a structured training plan with achievable goals. The key is that the training should feel relevant to the employee's needs. Once training is in place, be sure to follow up with them on their experience of the training session. This can inform their ongoing training plan and allow you to set new goals.

### Pro Tip:

Avoid mass training! While it may be tempting to pay for bulk training for whole departments at once, it really isn't productive. No one wants to be lectured on things they already know, so ensure the training is personalized and tailored to individual needs and interests.

## 2. Utilize the skills you already have

Chances are, your agency is full of people with expertise in different areas. Why not have them utilize those skills and share their knowledge with other employees?

Skill-sharing is a brilliant way to build a stronger, more inclusive team. It brings departments closer together and encourages a supportive working environment.

It's often the case that your team members have skills, talents, and interests they developed outside of the work environment that you can also leverage when expanding the agency's service offerings or deepening its skill level. How do you learn about this hidden treasure? Just ask your team members! It benefits the company and is highly motivating for the team members to be able to use and share their skills beyond the narrower scope of their existing role.

## 3. Utilize the skills you already have

I want to emphasize how important it is to build continuous learning into daily working life at your agency. Again, platforms such as Slack are really useful for this. It's innately social, so it doesn't feel like work to an employee, yet they can share useful training materials and spread knowledge and awareness on relevant topics.

Consider offering rewards and incentives. Acknowledging and praising great work will encourage employees to want to learn and do more, so make sure your employees' efforts don't go unnoticed.

If you want your agency to be successful, you must adopt and nurture a culture of continuous learning. Web developers and designers in particular never want to stagnate, so provide them with ongoing opportunities to upskill. If you don't, your employees will lose their motivation and may even leave you for an agency they feel will be more supportive. Which brings us to...

# SECRET #18:

## How to stop the revolving door by keeping your talent happy

A poor staff retention rate can put a huge strain on your agency. Not only is it disruptive to internal teams, it also impacts client relationships, making them question whether your brand is really what it claims to be.

Here are some things to consider to reduce turnover and hold on to that all-important talent:

### 1. Offer work-life balance

Most employees want a healthy work-life balance. This is especially true for Millennials. The world of work is changing, and perks are no longer just nice to have, they're a must. Perks aren't just financial, either—they are benefits that add to quality of life, such as an onsite gym or subsidized membership to a fitness club, flex hours, or a compressed work week.

When the coronavirus pandemic hit in 2020, agencies across the globe had to find new ways of working and come to terms with the concept of working from home. Many found that the benefits of remote working, such as the lack of commute and increased family time, improved the work-life balance. Even after the pandemic ends, remote working is here to stay, so your agency must embrace it or risk being left behind.

### 2. Create a positive workplace

It may not be obvious from the lofty viewpoint of the agency owner, but often the reason people leave a company is a toxic workplace culture. Make the effort to find out what the culture is like when you're not around (or even when you are!). If your agency isn't fostering a personable, positive, and supportive culture, your employees will walk out the door.

This does not mean you have to be like Google or Hootsuite and offer your employees afternoon naps, a free bar, and ping pong tables. But, at the very least, you should create a sociable and pleasant work environment so your employees don't dread coming to work each day.

#### Pro Tip:

Make it your mission to avoid hiring toxic employees in the first place! Remove those that don't support your company culture. Toxicity spreads, so make a point of actively staying on top of it.

### 3. **Encourage creativity**

It's strange to think of a design or development agency stifling creativity, isn't it? But believe it or not, some agencies do. Maybe not in their employees' day-to-day work, but by not listening to their ideas about how to make the business better.

You've hired your employees for a reason—they're smart and creative, which means they will have lots of great ideas, opinions, and observations to share with you. Take advantage of this kind of creativity, too, and encourage your staff to share. Make sure they know their voice is heard.

### 5. **Promote individual success**

Don't delay in shouting out individual employees' successes. It doesn't have to be with promotions and raises—it can be something simple, like implementing an employee of the month scheme that rewards specific employees for their hard work. It's a great way to show appreciation for those staff members who have gone the extra mile.

### 4. **Invest in your employees**

If you want to attract and keep the best people, you need to offer competitive salaries; otherwise, they'll go to an agency that does. That's obvious. But beyond salary, and even beyond personalized training plans and investment in high-tech equipment, successful agencies provide their employees with opportunities outside of work.

You should be offering benefits packages such as a health program, a great pension scheme, or a generous holiday policy. You can also foster engagement in your company by offering a long-term incentive plan such as stock options. That's a potential game-changer!

Investing in your employees' lives will go a long way to helping you retain top talent.



## 6. **Keep your promises!**

When a new employee enters a position in your agency, they have a perception of what their role will be. If the reality is very different, you'll have a hard time keeping that employee around.

Unfortunately, many agencies fall into this trap without even realizing it. They pile on additional responsibilities far outside the new employee's scope. Of course, this may be sometimes necessary for rapidly growing agencies. But there must be an open, honest conversation with employees first. You need to offer your employees a chance to voice their concerns, define their limits, and discuss their ideas.

Remember: when an employee feels they're not getting the position they were promised, they'll quit and move on to an agency that can offer them the role they want.

## 7. **Offer opportunities for growth**

Don't let your employees stagnate! Instead, offer them meaningful careers at your agency. As mentioned above, a professional training and development plan can counteract a sense of stunted growth, and can signal value and trust to your employees.

## 8. **Listen. Listen. Listen.**

Last but not least, the best way to combat retention issues and employee unhappiness is to listen to what your employees are saying.

Ask them for feedback; this will help identify specific conditions that they're not happy with and that you can improve. Additionally, if an employee does decide to leave, perform an exit interview to find out why they resigned. You may not be able to stop them from leaving, but the information may help you make changes that keep other employees from walking out the door.

If members of your team aren't engaged and driven to work for you, productivity will suffer too. A happy and motivated team should be a primary goal for any agency owner—your success depends on it!

## Conclusion

An agency is only as good as the people who work there. The best way to keep your clients happy is to attract top quality talent and keep them happy. Long before they start their job, new hires can be made to feel part of the team through strategic onboarding, an ongoing process of strengthening the bond with your company.

Employees who feel they have a good quality of life at their workplace, with opportunities for the kind of training and development that will propel them along their career path will be a lot less likely to jump ship for the competition.

## The Last Word



If you've made it this far, congratulations!

You now have a formidable set of tools to help you next-level your agency. You know how to systematize your sales process to vet prospects before signing them on. You know how to create amazing proposals with a time-saving template that will boost your conversion rates.

You now know the secrets of bolstering your cash flow with retainers—which kind is right for you, how to build the model, and how to make a winning pitch.

You know the secret of ethical agency partnerships. You've also seen what it will take to become the kind of leader who can expand your business, and what it takes to collect and keep a team of the best and brightest to help make your vision a reality.

Now, it's only a matter of putting the pieces in place, and you are just the person to do it.

Good luck!



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