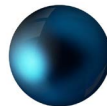# Analysis of the
Marketing Landscape, Operations
and Strategies for Future Planning

Prepared for [*Name Omitted*]

What kind of agency does [Name Omitted] want to be?
Where does the agency fit in the competitive landscape of today?
What market pain points does the agency answer?
And where are the possibilities beyond today for the agency?

This document takes a look at the agency's future, possibilities, and the current model of it fits into with respect to today's competitive landscape. In addition, this analysis assesses the agency's position in order to provide a strategic canvas for a more realistic perception of the offering through and objective point of view and the lens of the current market.

Outlining the vision for the agency's future, with a view to overcome obstacles and create solutions to aid the agency on its path to realizing its goals, this document includes progressive frameworks for growth, and provides recommendations across all areas of business for both short and long term strategies in order to accommodate the transition and change management needed to achieve the desired results, whatever the determined course of action may be.

growth

(noun)

2. anticipated progressive growth especially in capital value and income

goal

(noun)

2. the object of a person's ambition or effort; an aim or desired result.

Growing Client [Name Omitted]

The Principles of Business Growth and Goals

There are more ways than one to achieve business GROWTH

Growth does not have a one-size fits all model and can occur independently or simultaneously. There may be more than one process that works towards achieving growth, but there are guiding principles for planning and sustaining growth.

Growth is understood as the process of making an organization more successful. Examples of growth include: expanding into new markets, launching new products, or acquiring new business.

Growth can be attained through a singular path or multiple paths, however, the underlying principles of process are the same. Growth is universal, scalable, repeatable, gradual, flexible and muti-optional (it can happen in numerous ways).

GOALS are an agreed upon destination

Clear, codified goals set the path or mission of an organization. Goals align a team's purpose and are an essential part of strategic planning and progress. Shared goals help define, position and measure the rate of progress toward the objective future.

Without goal alignment, an organization cannot move efficiently or effectively forward. It can not adjust for obstacles appropriately. It cannot mitigate challenges effectively.

A company without clear goals, is a company without a clear path toward its future.

THE SHARED PRINCIPLES OF GROWTH

UNIVERSAL

SCALABLE

REPEATABLE

GRADUAL

FLEXIBLE

MULTI-OPTIONAL

Company Department Growth Strategies Can Differ
The Overriding Goal Should Be The Same

A business may have a variety of segments or divisions that utilize different strategies, and these divisions may have their own objectives. Objectives are comprised of tasks expected and the Key Results that it hopes to achieve, also known as (OKRs)

This prudent framework for an expanding company position often includes one or more revenue strategies. These strategies can be a mix of traditional and pioneering or new opportunities.

Pioneering strategies can run parallel to existing strategies, and may have separate goals, tasks and objectives, however, the overriding goal of the company remains the same.

The overriding company goal is the organization's guiding mission, or North Star. It remains the same across all strategies.

Objectives and Organization

Whether company's growth, movement and organization is compartmentalized into divisions, or together, as a singular product or service, there should be clear set of objectives set out for progression.

Objectives are not vague, but have clarity. They are SMART:

S	specific
M	measurable
A	achievable
R	realistic
T	time bound

The division best suited to achieve the underlying tasks of the objectives should help to determine the tasks and *parameters* in a transparent fashion and, where possible, include the feasibility, obstacles and viability within ***the current scope of the plan.***

Determining OKRs is part of the STRATEGIC SYSTEM OF PROCESS, an SOP.

Measure to Adjust and Improve
Metrics and time bound measurement are set to determine how to adjust a task and improve it for better result, to narrow the parameters for the next similar task, and to better deploy future strategic action for more expedient, efficient and improved results for progressive future tasks.

The only failure is an inability to learn from the past.

PEOPLE NEED PURPOSE

When there is no purpose, people invent their own

or·gan·i·za·tion

(noun)

1. an organized body of people with a particular purpose, especially a business, society, association, etc.

Hierarchal and Non-hierarchal Organizations

New fashioned, non-hierarchal organizations sound cool, casual and friendly. These structures work well for small companies and start-ups, which might account for the "cool factor" but they are difficult models to scale and grow.

As one institutional psychologist wrote: "there is no opposite of hierarchy," equating it to envisioning Maslow's triangle as a "circle of needs."

Ideologically, flat organizations are supposed to foster a collaborative creative culture, democratic and Kumbaya. More often than not, the cultural climate descends into *Lord of the Flies*. It is not your company, its human nature.

A multi-dimensional and growing company, such as [Name Omitted], needs clear structure, with lanes and rails, to scale without conflict. In addition, clear ideas about leadership and management, job roles, departments and purpose, as well as levels of autonomy.

How to have a win-win structure

When people clearly understand their role, changes in their role, and their responsibility, they feel better knowing where they belong. They have purpose in their day and understand their path.

With clear outlines, a business owner or leader can "ultimately have a business that can deliver on its promises, even on the days when management is absent.[1]"

It is much easier to move an organized body forward, towards your goals.

[1] The Psychology of Hierarchy: Welcome to the Ballet Mike Cook Leader of High-Performing Bellingham CEO Group at Vistage Worldwide, Inc.

Rewards, Compensation, Leadership and Management

High performance deserves reward. However, leadership and management are not a rewards. These are a positions that require skills, ability, specific personality traits and grooming.

New, clear responsibilities, special projects and challenges, bonuses, vacation time and compensation are other ways of rewarding high performing employees. Additionally, one could ask deserving employees where they would like their path to go? or how they would like to see themselves compensated.

A certification? Course? Personal goal they would like assistance with? It is often recognition, a new challenge or personal growth that needs to be fulfilled - not necessarily title.

Client [Name Omitted]

Client [Name Omitted] is a 30+ year old legacy agency.

[Name Omitted] is a public persona, who has created a brand in the community and through philanthropic efforts, and continues to remain the face, name and brand associated with the company.

In its time, [Name Omitted] has grown in a number of ways: by engaging in networking groups and membership organizations, through publicity and advertising, and from its initial beginnings, through business acquisitions, relationship marketing and network referrals.

When [Name Omitted] came on board, he introduced Corporate Communications to the business and expanding it into a new channel for and subsequently growing the revenue.

A few years later, [Name Omitted] from [Name Omitted] expanded the business into commercial production and brought public television production business to the studio , broadening the scope of [Name Omitted] Studio's offering and clientele to now national and international brand status.

Today, [Name Omitted] is not slowing down. With a dream to grow this legacy to top the region.

A look at Client [Name Omitted]

Client [Name Omitted] currently has three (3) areas of business and
one (1) developing area of business.

Client Company

	PRINT & DIRECT MAIL	CORPORATE COMM.	VIDEO PRODUCTION	CREATIVE MARKETING (DEVELOPING)
BUSINESS ACQUISITION	reputation/awareness	unique sequestered in-house relationship	reputation/awareness	partnership coop
	referral relationships	referral/relationships	referral relationships	cross promotion
	bidding systems	agency partnerships	agency partnership	agency partnership
	agency partnership			

The Print Division
By in large, the print division functions independently. This division uses traditional waterfall workflow process, digital (Approach) and traditional.

The Corporate Communications Division
The Corporate Communications division is unique in a number of ways. Teams and administration are mostly off site and/or subcontracted. The majority of work is project based through 2-3 clients through a sequester employment arrangement held by CRO, [Name Omitted]. The Corporate Communications Department utilizes Workamajig for workflow in a waterfall process.

The Video Production Division
[Name omitted] the majority of work via referral, and utilizes traditional calendar workflow and Harvest for account management.

The Creative Marketing Division
A developing division, has not had a dedicated strategy. The division is mostly engaged in [Name Omitted] projects, with a handful of projects. Project, process and account management are not codified. Based on current process, hours, revisions and workflow CAC would likely reveal a loss on billable client hours due to loss in project management. Strategic, creative and work-flow process and traffic management is advised. Recommending Monday for its ease of use and cost effective plans. Note: The program could be transferred into a larger platform as needed at a later date.

Top Down Overview

Each of [Name omitted] four areas of business are unique and capable of operating independently.

Together, with stronger process, management and organization, [Name omitted] has the potential of providing clientele one of the most complete agency offerings on Long Island.

Each area has some level of independent hierarchy. Growth, both in the market and in the company, has led to new areas of responsibility as well as some lack of clarity in roles and responsibility.

Within each division there are:
- Differences in process management and workflow systems
- Differences in types of work product
- Different work requirements and therefore unique production structure
- Growth, new talent, new offering and new production and new capabilities

With the acquisition of new talent, acumen and growth, new organization, new process, structure and workflow are inevitable, and even required in order to executed work a profitable and efficient manner.

When operating independently, the "As-Is" system of operation is functional. Some divisions function better than others.

Each division functions in a completely unique manner, and some divisions are disruptive to other divisions workflow, operations and management when operating cross-functionally. It is when the agency divisions cross that there is a tendency to loose efficiency or break down.

> Note: Cross-functional operation in this context means one or more of the following:
> 1. a team member is utilized across divisions,
> 2. a project is "shared" across divisions,
> 3. or a client/potential client is managed across division,

To ready itself for growth, it is recommended the organization preemptively accommodate company structure and process into its plans.

This includes:
- Codification of division structure and hierarchy
- Human Resource Allocation
- Job Descriptions and Purpose
- Process Management/Job Trafficking
- Work Flow/Expectations

Where does [Name omitted] Fit in the Market?

The following is an As-Is strategy canvas depicting the perception of Client [Name Omitted] value offering as a complete agency in the competitive market, as compared to the Long Island regional marketing and communications industry, where it competes.

The Y value axis is an estimated value base that combines price and offering comparisons, x value axis is a landscape of services offered that are relevant to the industry today.
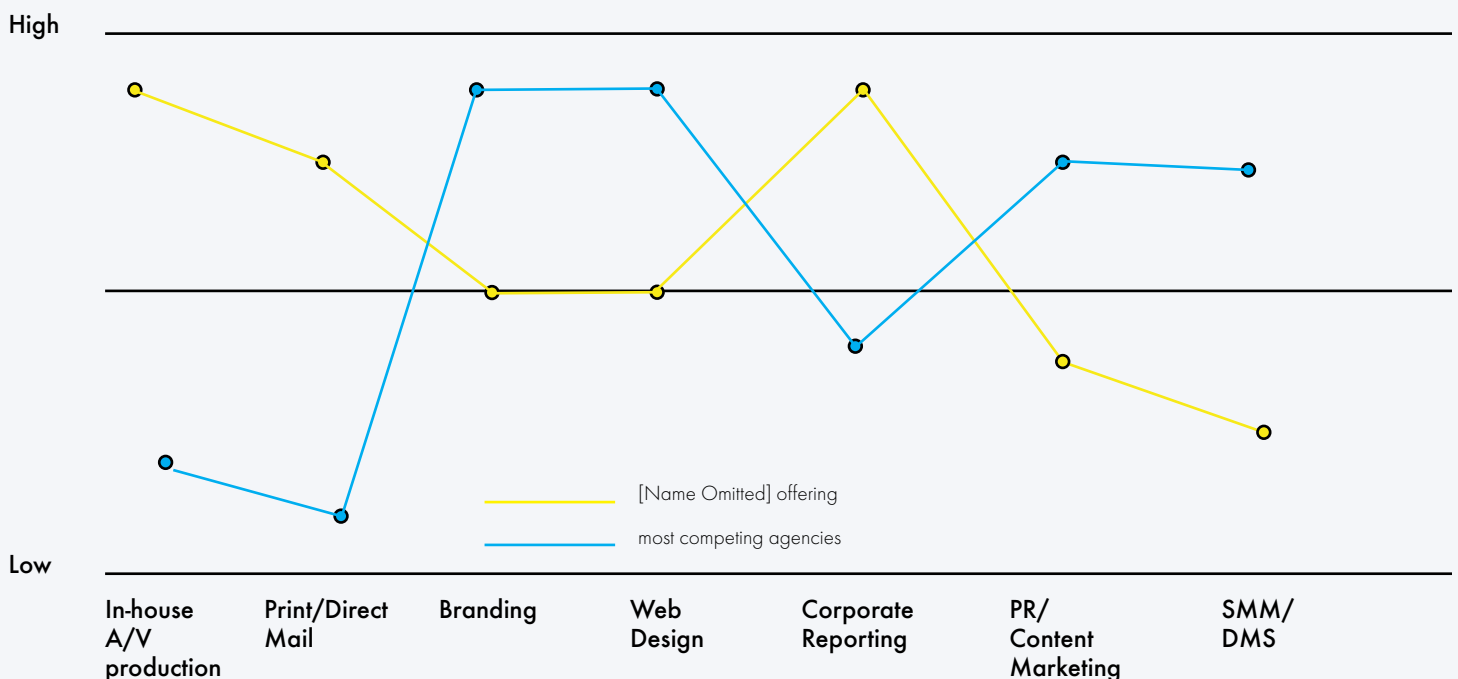
As-Is Strategy Canvas showcase a number of [Name Omitted]'s very unique propositions that other agencies do not offer.

It is important to note that in this As-Is state, [Name Omitted] **supplements the current strategy canvas of agencies,** able to sell to those agencies. Websites and branding are offered by nearly all agencies, and digital and content marketing at most.

As [Name Omitted] increases the value of its offering in the Digital and Content Marketing, the agency becomes **a competitor in the high value market,** thusly changing the agencies position.
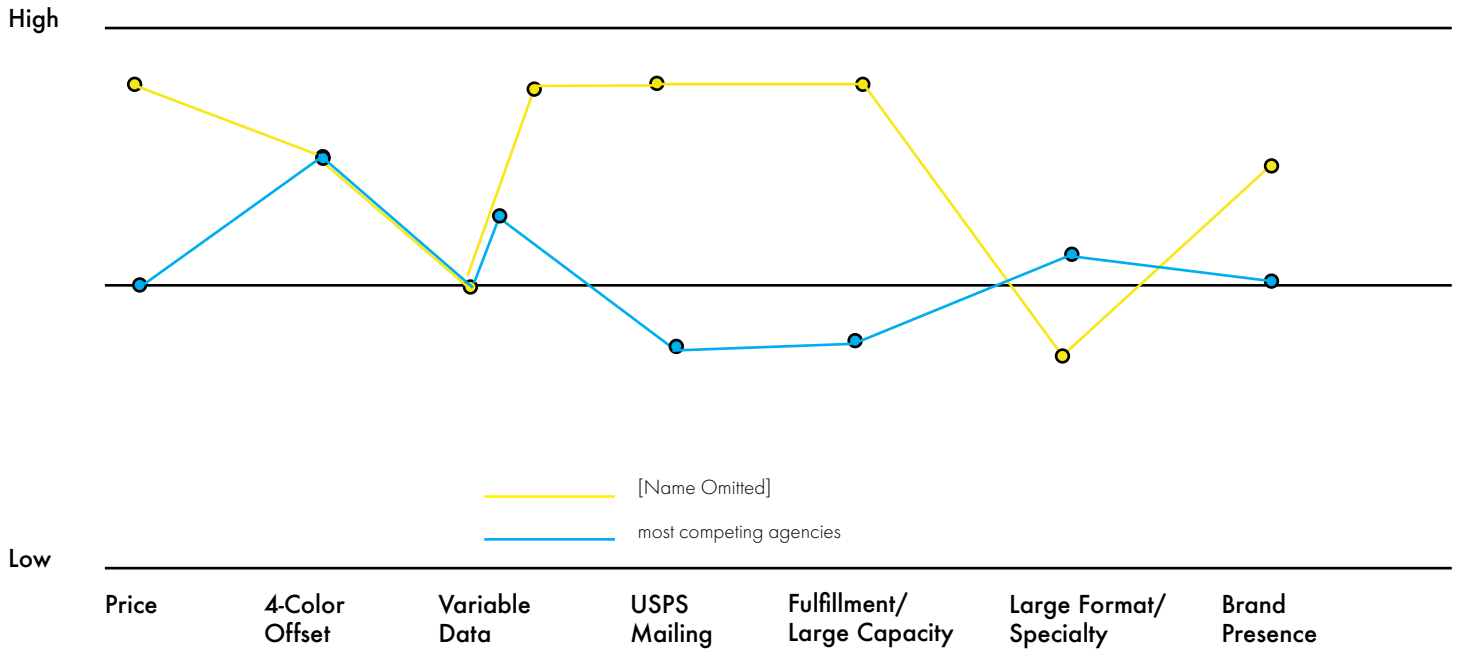
A repositioning of its marketing efforts, including area the agency networks, markets and promotes, more aggressive promotion, and messaging more reflective of that higher value would be needed to "level up" and compete in that position. These are factors to be considered.
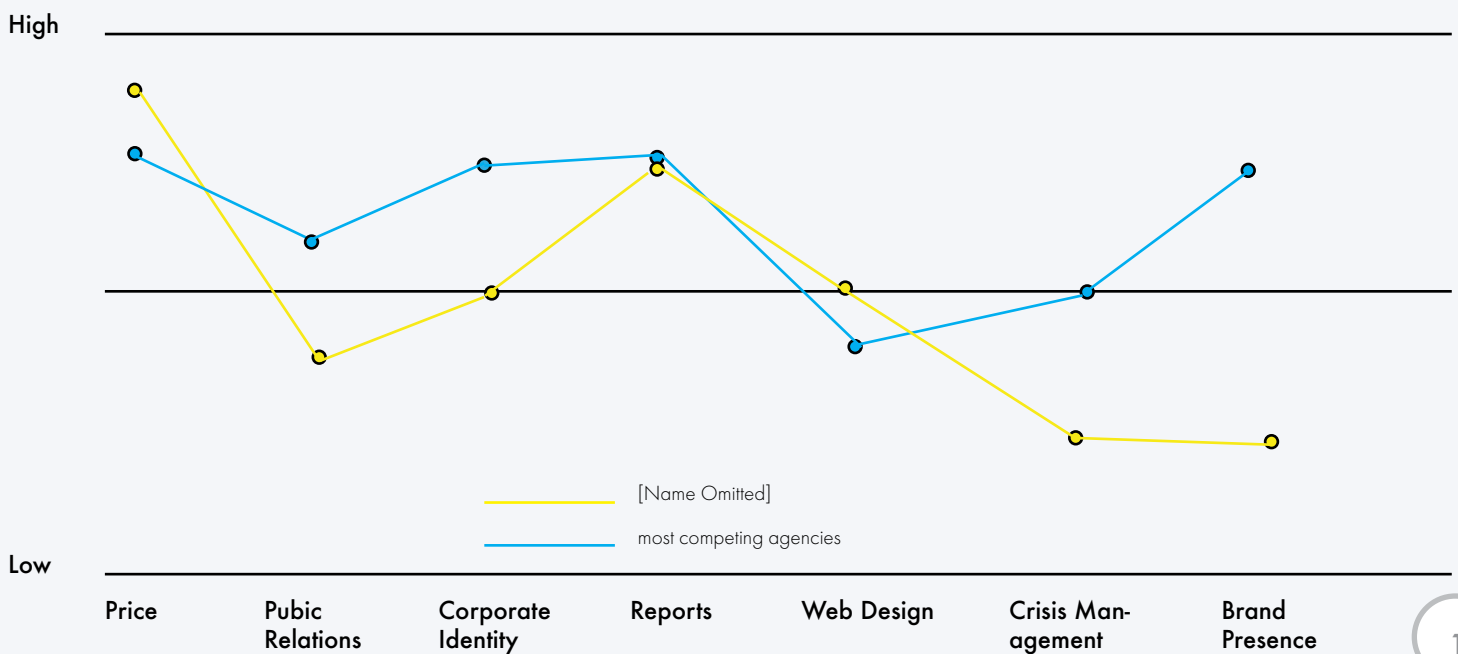
Current "Complete Agency" As-Is Canvas

High

Low

[Name Omitted] offering

most competing agencies

| In-house A/V production | Print/Direct Mail | Branding | Web Design | Corporate Reporting | PR/ Content Marketing | SMM/ DMS |

A Look by Division

Print and Direct Mail As-Is Strategy Canvas

High

Low

[Name Omitted]

most competing agencies

| Price | 4-Color Offset | Variable Data | USPS Mailing | Fulfillment/ Large Capacity | Large Format/ Specialty | Brand Presence |

Corporate Communication As-Is Strategy Canvas

High

Low

[Name Omitted]

most competing agencies

| Price | Pubic Relations | Corporate Identity | Reports | Web Design | Crisis Man- agement | Brand Presence |

A Look by Division

Video and Production As-Is Strategy Canvas

High

Low

—— [Name Omitted]

—— most competing agencies

| Price | In-Studio Capabilities | Audio Production | Reputation | Placement | Simplicity | Brand Presence |
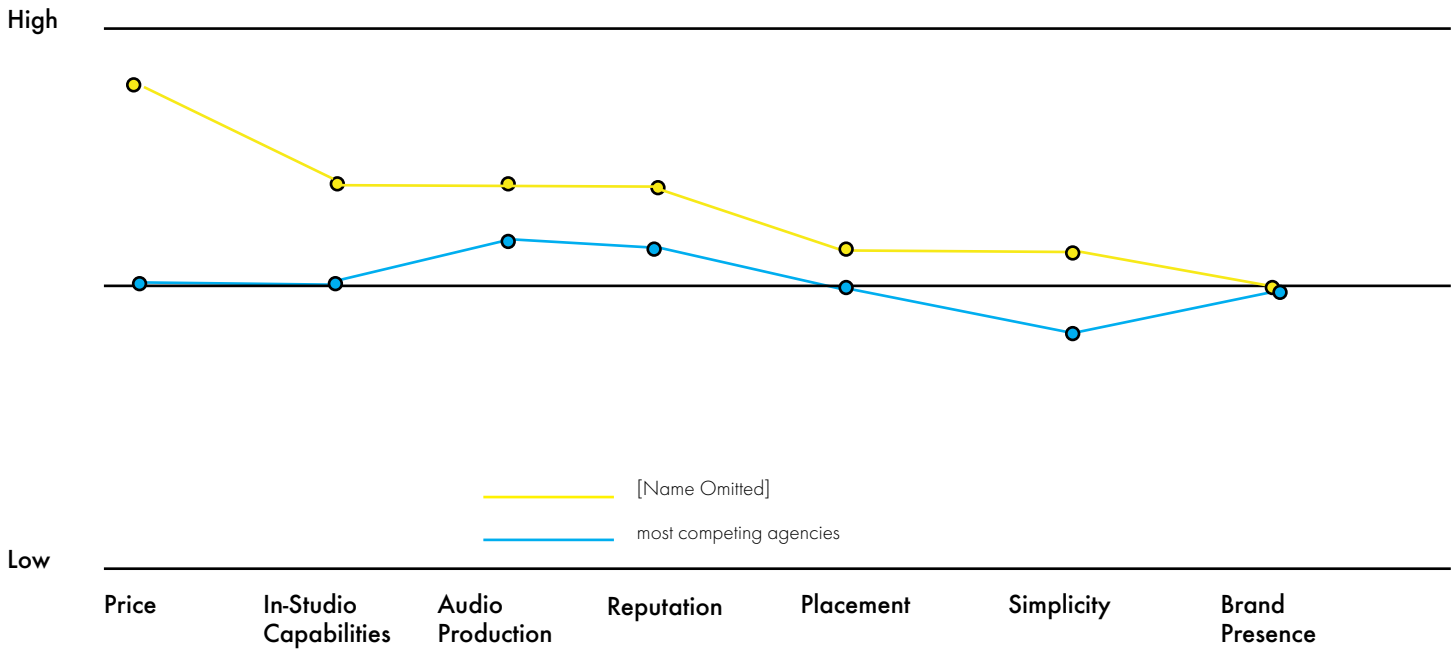
Marketing/Creative As-Is Strategy Canvas

High

Low

—— [Name Omitted] (Note: [Name Omitted] marketing is in the developing stages

—— most competing agencies

| Price | Digital/ Technology including tech stack | Branding/ Creative | Account Service | Public Relations | Web Design/ Development | Brand Presence |
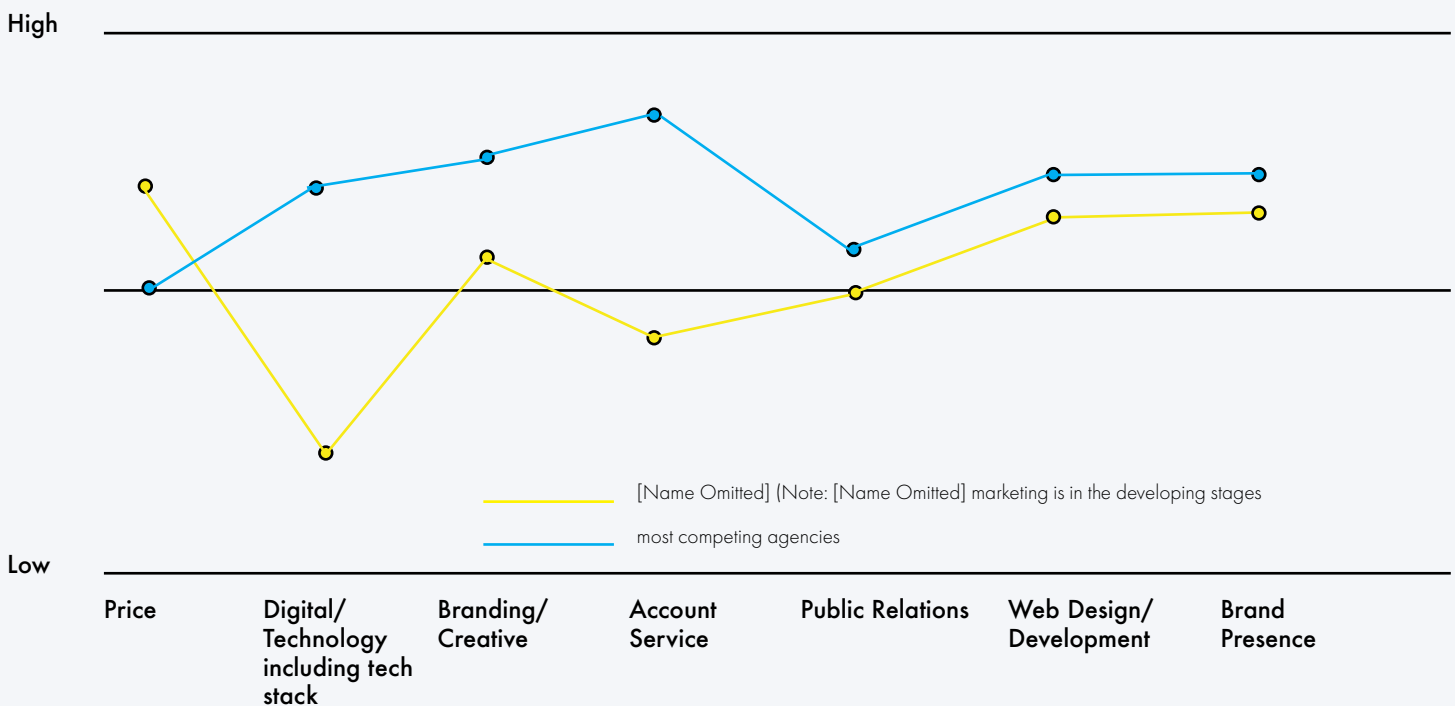
Where could [Name Omitted] gain value?

As a full service agency, [Name Omitted] has the potential to answer a market need by providing brand stewardship and complete service attention, offering clients greater control of their marketing without bringing marketing in-house. From ideation to execution, even fulfillment.

Is that enough to differentiate [Name Omitted] in the market?
Where can [Name Omitted] gain value?

Looking across the utility levers available though customer experience, there are areas where [Name Omitted] can create new value without incurring costs, but through and organized strategy and execution process.

	PURCHASE	DELIVERY	USE	SUPPLEMENTS	MAINTENANCE	DISPOSAL
PRODUCTIVITY		●		●		
SIMPLICITY	●	●	●	●		
CONVENIENCE		●				
RISK	●	●			●	
FUN/IMAGE						

Creating new value to break free from the market.

If positioned and promoted correctly, finding new customer value that is different from the current market could help [Name Omitted] break away from the competition without increasing costs or changing the product itself.

[Name Omitted] is already a unique offering. The customer utility map exercise can be completed as whole agency, or as divisions. Opening the exercise up allows for the entire company to get creative, and become a part of the process.

Finding new areas to attract new attention and new audiences, then strategically promoting it as part of a pioneering growth strategy, opens [Name Omitted] up to new market pathways that help [Name Omitted] stand apart from the rest of the pack.

Once leadership defines the agency offering with clarity, it will be able to set the strategic canvas for customer experience and strategic approach.

STEPS TO CREATING NEW OPPORTUNITIES

EVALUATE AS-IS CANVAS

CODIFY VALUES

DETERMINE GTM STRATEGY

ALIGN PRODUCT & MARKETS WITH MESSAGE

DEFINE [Name Omitted]'S GTM

> ## The single most important decision in evaluating a business is pricing power.
>
> *~ Warren Buffet*

Pricing and Positioning the Agency for Market Growth

There different factors that influence business pricing decisions and costs structure, and dozens of models, but only four (4) recognized as effectual in business growth,: cost, value based, competitive based, and radical. Pricing strategy has been shown 4x as efficient in improving revenue as acquisition, 2x as efficient as improving retention.

Juxtaposition of Agency to Market

When considering a pricing strategy, it is essential to consider:

- Competition in the market
- Time in the market
- Proven experience
- Unique offering or innovation
- Approach (as full agency or as division)
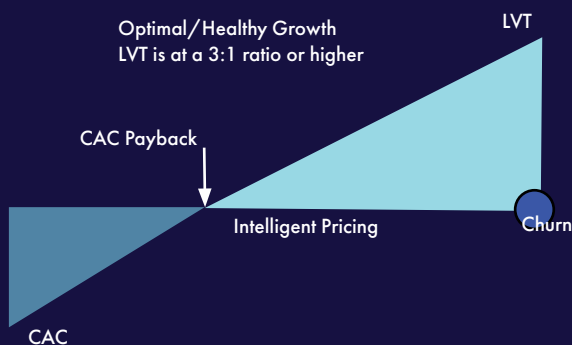- Codified Promotional Strategy

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It is not uncommon to have more than one pricing structure or strategy.
Pricing is the most powerful lever to adjust for market growth.
It is important that metrics are in place to ensure growth.

2023 INDUSTRY PAIN POINTS

30% SAY CLIENT CHURN

55% SAY GROWING CLIENT BASE

48% DIFFICULTY INCREASING REVENUE

*Instapage.com/state-of-the-marketing-agency-report

METRICS THAT MATTER

Lifetime value of a client and customer acquisition cost are essential metrics for measuring growth. The challenge? Balancing acquisition spend with lifetime value.

Optimal/Healthy Growth
LVT is at a 3:1 ratio or higher

LVT

CAC Payback

Intelligent Pricing

Churn

CAC

Customer Acquisition Calculation =

$$\frac{\text{S\&M Salaries-Tools-Spend}_1}{\text{Acquired Customer}_1} + \frac{\text{S\&M Salaries-Tools-Spend}_2}{\text{Acquired Customer}_2} \cdots \frac{\text{S\&M Salaries-Tools-Spend}_n}{\text{Acquired Customer}_n}$$

Lifetime Value Calculation

This is an average value, for [Name Omitted], this value fluctuates over its divisions

Before creating a price strategy you need to assess market & buyer

Pricing strategies are part of the 4 P's of marketing, and the easiest of the four (4) levers to change. However, missing the mark can be detrimental to your strategic growth plan. While marketing balances price, position, presence and placement; revenue growth balances acquisition, price and churn.

Markets, Positions, and Steps to Creating Pricing Strategies

Looking back at the [Name Omitted] As-Is strategy canvas maps, for the agency and the various divisions, we need to ask if the agency is positioned for any one market successfully? Has the agency gained better selling success acting independently or as a whole?

Promotion
General agency promotion, outside of relationship marketing, is mostly networking groups and regional business publications; HIA, LIA, LIMBA, ADAPT, LIBN, LI Business News as well as Rotary, and other regional organizations.

This places [Name Omitted] in the general business, along side with other mid level agencies and general business marketing entities. Looking again at the As-Is canvas, there are areas [Name Omitted] compliments and excels beyond the regional agency, and areas where the [Name Omitted] falls short, for example, digital marketing and marketing technology.

[Name Omitted] 's larger revenue streams are through partnerships where certain conflicts of interest or unique relationships exists. These unique relationships, where [Name Omitted] has the largest revenue streams, may have inhibited paths to expansion due to the unique nature of the relationship.

Pricing
[Name Omitted] pricing is competitive with higher-end agencies engaged in larger promotional efforts, advanced digital technology, promotional and human resource investment. Often these agencies have a niche product, a AAA rating, or a unique attribute in the high end market that they are heavily promoting.

Pricing is carried over into [Name Omitted] 's mid-market products where [Name Omitted] has not gained significant market traction or revenue growth; and adjustment in one or more of the four (4) marketing levers may need to be considered.

Creating Multi-Channel/Multi-Division Price Structure Strategies
Each division needs to deeply define their buyer persona based on its top 3 target markets, answering the following:

Consider the Buyer Persona
Is it a price the buyer is willing to pay?
What is the estimated Lifetime Value of that customer?
What is the estimated Customer Acquisition Cost?
What are the top three channels?
Who else is making the they buying decision?
What are the top value propositions they care about?
What is the competitor charging?

Find Right Features
What are the must have features for sales?
What upgrades and add ons can enhance pricing?

What is the Value Metric?
Is the price, anticipated LVC and CAC
going to lead to growth?
Does it have another value? Market entry?

Did you Consider the Actual Pricing?
If it is too high, customers won't purchase.
Too low, audiences will undervalue it.
Is it a really great deal?
Is it getting expensive but still worth the investment?

**Pricing strategy is an essential part
of the growth model.**

Valuable Insights

Including metrics in [Name Omitted] 's acquisition data helps provide the agency with accurate data and metrics on the agency's growth, client value, customer acquisition expenditure and target marketing.

The new website offers the ability to utilize back end programming and API integration to create dashboards that can integrate the variety of programs the agency currently uses through APIs for workflow process calculations, CRM management, pricing quotes and competitive analysis. With this information, targeting the right customer base, setting intelligent pricing strategies, and growth acquisition could be facilitated methodically, for maximum return on investment with minimal disruption.

RECOMMENDED METRICS TO ADD

CUSTOMER LIFETIME VALUE

PRICING PER MARKET

PRICING ADD ONS

COMPETITIVE PRICING

AGENCY COST/TIME

CUSTOMER ACQUISITION COST

CLIENT

PRODUCT

INDUSTRY
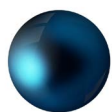
WITHOUT GROWTH AND PROGRESS

IMPROVEMENT, ACHIEVEMENT AND SUCCESS HAVE NO MEANING

Ben Franklin

Work With Meaning

When companies have clear objectives, specific strategies and shared goals, progress is possible. Organizations work together to create the environment necessary for successful attainment of these goals, and challenges and obstacles are met and overcome together as a team.

When objectives are codified, tasks and responsibilities follow suit. Teams unify and work to create solutions and opportunities. Pathways and processes become more efficient, and are optimized for future, creating efficiency, and productivity - a well oiled machine.

An organization.

What is the Purpose of [Name Omitted] ?

A company's goal aligns the organization and helps set up the principles of its unique value proposition.
It answers the purpose of the organization, succinctly, as a whole, in an easily understandable and repeatable fashion.

It is a singular statement that resonates with narrator and audience, but most of all, it gives the its the work purpose.

Client [Name Omitted] Goal Alignment

To ready Client [Name Omitted] for real growth, goal alignment needs to resonate across all divisions,
be transparent in its mission and articulates the ultimate purpose of the various divisions' work and progress.

Whether the various divisions have a level of independence or operate as a singular entity, goal alignment helps the organization
effectively understand and communicate the mission of [Name Omitted] as a whole.

This needs to be understood in a simple complete, repeatable statement that:

1. answers the purpose of the organization
2. clearly and simply articulates [Name Omitted] 's value proposition
3. sets up the penultimate goal or destination of the organization

The answers to the above questions clearly define the direction of the organization.
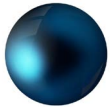
Aspiring Visions

In order to develop the strategic foundation for promotion, [Name Omitted] needs to codify its evolved foundational message to reflect its current organization, mission, vision and proposition.

As the company has grown, and its leadership has taken its division in various directions to achieve this growth, the direction of the overall company is not clear and vision varies depending on which division you are conferring with, and when.

The logical course of action is to codify this message based on direction from company hierarchy.
Discovery and validation is where the following example is drawn from:

Vision
Client [Name Omitted] vision is to be the region's most complete agency, a beacon of leadership, experience, and acumen; empowering businesses, nonprofits, and professionals across diverse industries and markets.

Mission
Client [Name Omitted] turns clients' potential into power, aspirations into achievement and goals into greatness.

Unique Value Proposition
[Name Omitted] offers superior solutions aligned with client objectives and executed from end-to-end with precision and control for outstanding results that set our agency apart.
Let [Name Omitted] show you the power of experience, relationship, and dedication to marketing excellence.

It is important to realize that the Vision, Mission and UVP of the overall company does not mitigate the value of individual divisions,

but is in fact an addendum and value-add to the divisions.

START WITH VISION

Dr. Joerg Storm · Following
Follow me to learn how you can use AI to 10x your productivity & accelerate your c...
6mo · 🌐

Businesses should start with the "Why" to ensure their efforts are worthwhile and effective.   ...see more

1. **Why** → **Vision**

2. **What** → **Strategy**

3. **Who** → **Segmentation**

4. **When** → **Roadmap**

5. **How** → **Specifications**

Setting the Foundation

Regardless of how an organization grows, there are foundational elements that need to be set in order to move the process forward. As Client [Name Omitted] is realistic in business and in budget, discovery begins with the resources it has collected for over 30 years including gathering information, data assets, experience and the acumen inside its human resource capital.

The strategic foundation map on the opposite page sets Client [Name Omitted] up to BEGIN marketing in the digital space.

The plan helps to create a digital home that will gather and applying metrics to the massive efforts the agency has been undertaking, offer automations where possible so the company can continue to run lean, and apply consistency to messaging across the funnel and pipeline to improve metrics on efforts.

The deployment of such effort requires organizational buy-in, clarity and transparency across all divisions for optimal success as it is a transition, or change. Without transparency and company wide buy-in, "resistance" is common, and can ultimately lead to failure to launch.
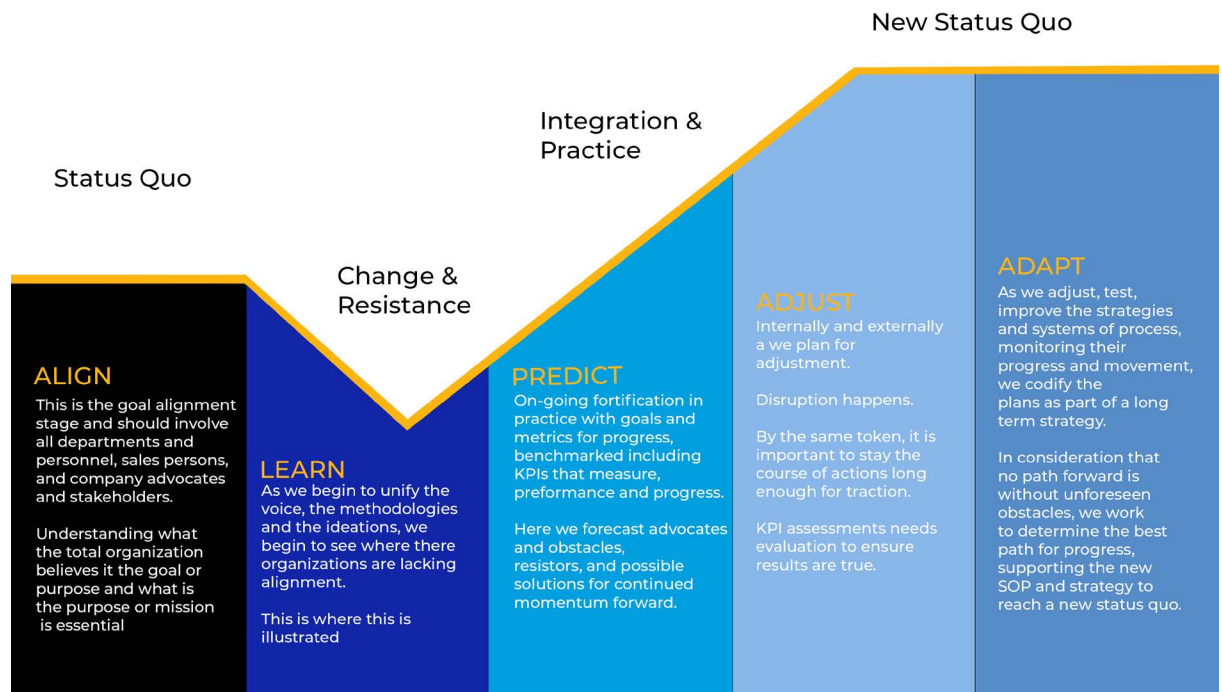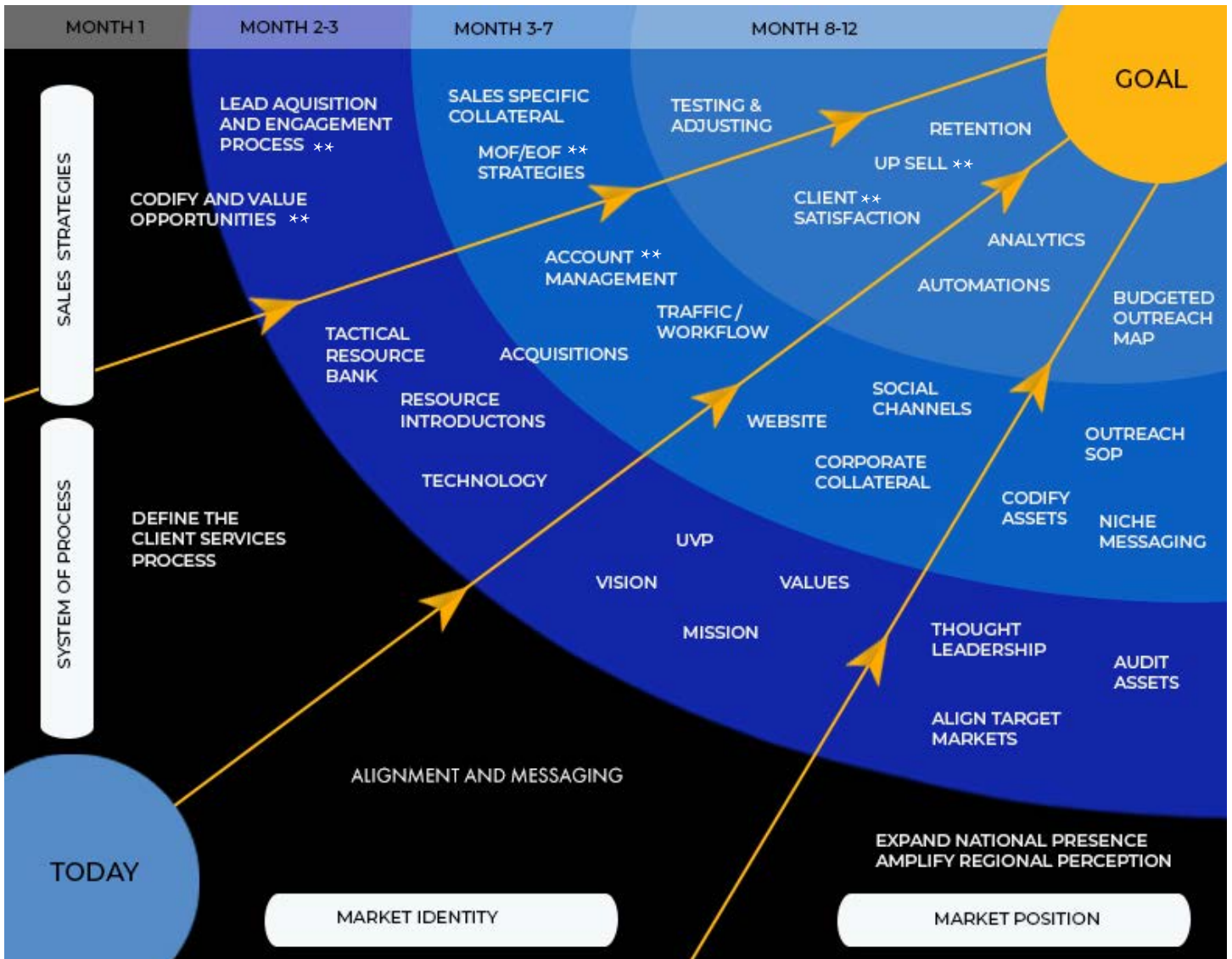
From this foundation, outreach should begin.

Transparency and Change

Change is a disruptor, regardless of positive or negative. Disruptions move things around. Creating a clear, and confident picture of the end-goal including the roles, places, purpose of incumbent personnel, and new personnel, helps mitigate resistance.

Without transparency, you can not have alignment, setting strategy execution up for failure.

More than
75%
of strategies fail due to the execution gap

New Status Quo

Integration & Practice

Status Quo

Change & Resistance

ALIGN
This is the goal alignment stage and should involve all departments and personnel, sales persons, and company advocates and stakeholders.

Understanding what the total organization believes it the goal or purpose and what is the purpose or mission is essential

LEARN
As we begin to unify the voice, the methodologies and the ideations, we begin to see where there organizations are lacking alignment.

This is where this is illustrated

PREDICT
On-going fortification in practice with goals and metrics for progress, benchmarked including KPIs that measure, preformance and progress.

Here we forecast advocates and obstacles, resistors, and possible solutions for continued momentum forward.

ADJUST
Internally and externally a we plan for adjustment.

Disruption happens.

By the same token, it is important to stay the course of actions long enough for traction.

KPI assessments needs evaluation to ensure results are true.

ADAPT
As we adjust, test, improve the strategies and systems of process, monitoring their progress and movement, we codify the plans as part of a long term strategy.

In consideration that no path forward is without unforeseen obstacles, we work to determine the best path for progress, supporting the new SOP and strategy to reach a new status quo.

The Foundational Marketing Plan

The above plan was not fully set into motion, some parts have been acted upon, albeit outside the preferred framework, a proven method that streamlines the effort.

Areas that have been completed:
1. Proposed client service process
2. [Name Omitted] messaging (may need realignment/revision to align with buyer persona)
3. Proposed Vision, Mission, UVP, Value, Website, Corporate Collateral*, Analytics, Automations*
4. Proposed Traffic Work Flow
4. Sale specific collateral*
5. Codified Opportunities Across Video
6. Audited Assets, Niche Messaging
7. Thought leadership including PR Opportunities*
   *Projects and Process is ongoing, current product could be strengthened with accurate buyer persona
   and messaging alignment.
   ** areas on map are where greater in-company cooperation is needed.

Areas that need strengthening:
1. Metrics for customer value and targeted acquisition
2. Accurate buyer persona matrix
2. Systems of Process
3. Organization and accessibility of resources
4. Strategic Planning
5. Social Media
6. Outreach System of Process Frameworks (Goal > Target > Strategy)

The Website and Digital Content
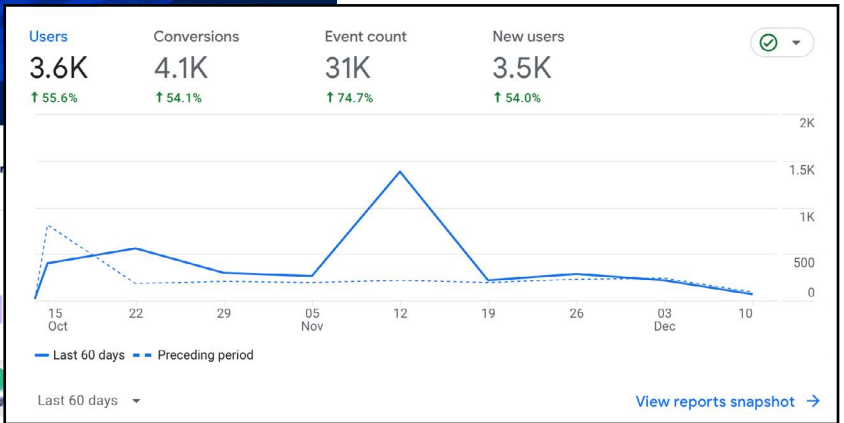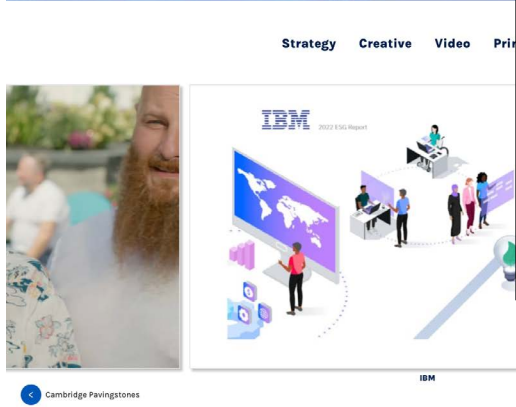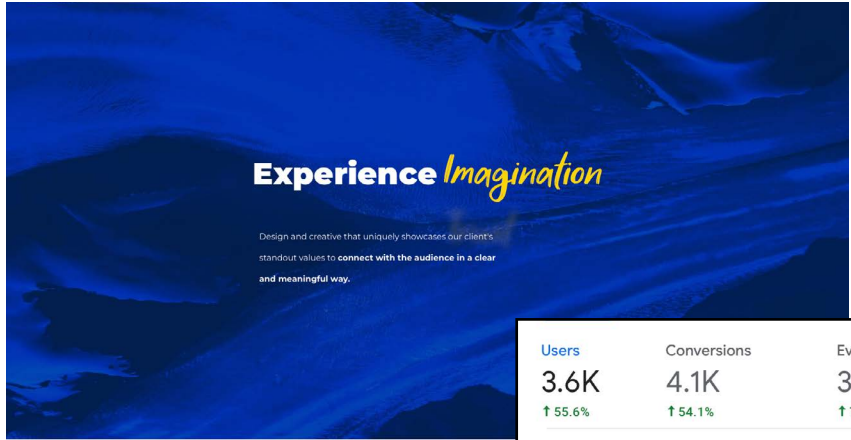
[Name Omitted].COM
The Client [Name Omitted] website launched October 15th and greatly improved the agency's on-line visibility.
In two (2) months the website has welcomed 3,500 new visitors, a 54% increase, and improved SEO scores by nearly 40% across the board.

The site is extraordinarily unique, created for design and edit flexibility. A Dot-Net-Nuke site, the style sheets separate from the artwork so design can be completely altered without destroying the programming for longevity, including programming languages supported for 10 years as opposed to other languages.

Email Content

Email campaigns shifted in May to reflect different content more apropos to marketing material, vision and values (non-profit support) of [Name Omitted]. Response to the outreach was immediately reflected in the email metrics, including email click-through rates, heat maps and direct traffic referral to the websites.

Further improvement with personalization, competitive analysis, emails segmented by buyer persona and fully planned strategies that combined sales and marketing efforts would greatly benefit the overall conversion strategies.

Arrow notes where the content shift took place.
The top purple line is the open rate, the bottom blue line is the click through. Not every email has CTA buttons and actions.

Social Media

Client [Name Omitted] has a number of social media channels. Client [Name Omitted] on LinkedIn, Facebook, Twitter, [Name Omitted] Studio, Facebook and Instagram and the YouTube Channel.

We have not revamped the channels as of yet. A look at the channels and what is working and what is not working is important. Are the channels referring traffic the website or to other conversion actions? Are they drawing attention to lookalike clients to further our base? Do they advance our leadership in the industry? Are they enhancing our Search Engine Optimization? Are they providing value to the viewer?

Social is becoming more important, but utilizing it appropriately is also important, particularly if digital is a channel we are looking at selling to our clients.

Client [Name Omitted] Facebook reach has improved with website referral, nearly 10% at 337, with 978 followers, but it is not reflective of the competitive field. [Name Omitted] Studio site is not competitive.

Portfolio
Value Missions
Candid Employee Life
Authentic Career and Office Moments
Acumen/Leadership
Visitor Surprises
Industry Collaborations
Niche Market Highlights

Facebook visits ⓘ

845 ↑ 43.5%
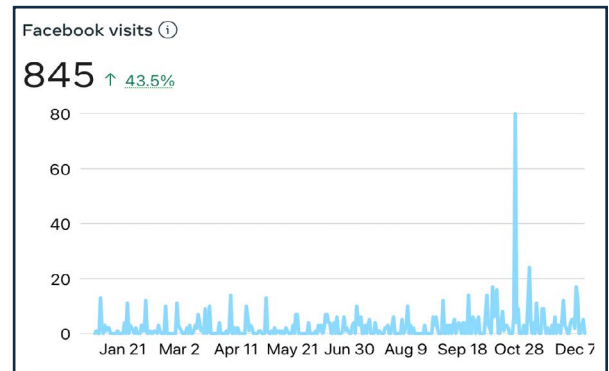
Content Creation

One of the top pages visited and created on the website is the Insight page which offers industry related topics and showcases [Name Omitted]'s industry acumen. The page is accessed directly as well as via referring pages. This is testament to the interest in the agency's experience and knowledge base.

[Name Omitted] are content producers, profusely putting out articles, essays, blogs, Vlogs, shows, podcasts, artwork, motion graphics and more. CEO [Name omitted] is writing two books simultaneously at present.

There is no shortage of content. What's missing?

Framework.

RECOMMENDED: STRATEGIC FRAMEWORK

At [Name Omitted] , creativity and dedication is abound.
There are many producers, yet progress in certain areas, an uphill climb.

Adding the rails of a well thought out strategic marketing and growth program coupled with system for production and inclusive planning and process inside the agency, to be carried out by team members with designated roles and strategic acumen, unmitigated and unencumbered, will help the agency reach the heights it desires.

Breaking Away to Grow

Evolution, growth and change often means taking things
apart and putting them back together to bring new order.

If growth is desired, there are many ways to bring about new order:
in part, in groups, or all at once.

Tolerances, culture, market climate and reintroduction to a plan,
are all reasons to carefully consider the different ways
you can manage change and change resistance
when planning for growth and new direction.

Embarking on a new mission often alters the way a business
functions.

Planning for the endeavor should not be taken lightly.
Any change that involves people is disruption.
Detail and transparency across the company
cultivates an environment of acceptance and ease.

Clear understanding of where everyone fits, what their purpose is
in the new organization, their beginning and their end, and the role
that each player can play, unencumbered, while helping move
the mission forward is imperative.
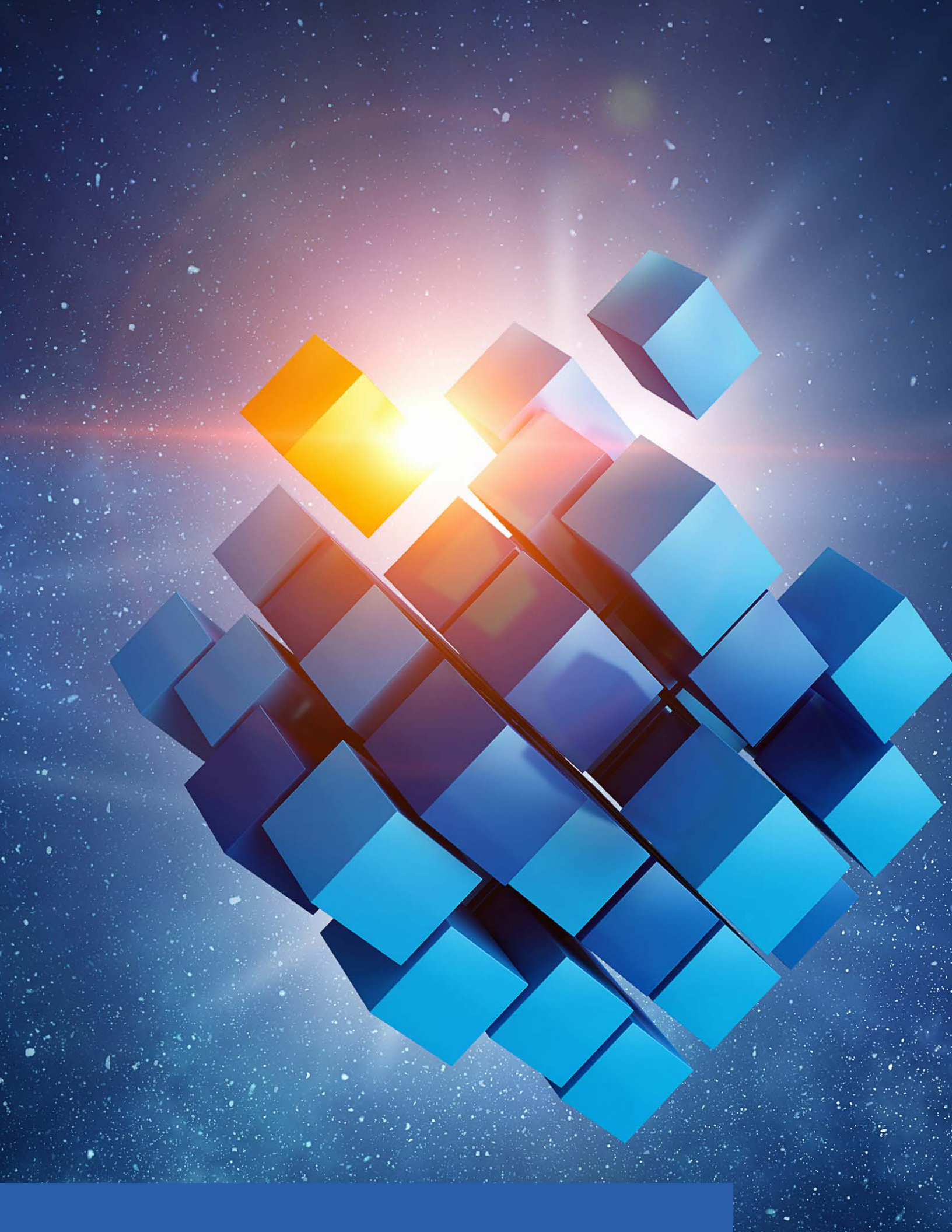
Where are we going? How Do We Get There?

The Penultimate Goal & Positioning of the Agency for The Market
It has been stated [Name Omitted] 's goal is to be the most complete agency in the region.
As demonstrated by the As-Is canvas, across the agency divisions the selling attributes appear to have some GTM attributes that have not fully considered the buyer persona of the market spaces they are currently selling in, creating challenges for attribution and positioning Client [Name Omitted] at odds with competitors.

In addition, [Name Omitted] has "whale" clients, mostly in its Corporate Communications and Print Division, where promotion is not viable or where it is challenging to promote as currently positioned.

Marketing the 4 Divisions
At present, the agency's 4 divisions are very different including:

- As-Is strategy canvas and buyer utility map market assessment
- operation
- system of process
- buyer persona
- competitive matrix
- pricing
- promotion
- proposal
- and selling strategies

These differences create a different set of objectives, tasks and key results, from which to measure customer acquisition. This sets up difficulties in merging divisions into a single strategy, metric and system of process across the agency.

In addition, understanding the various divisional processes, workflow, traffic and coordination can also present problems with cross-divisional work flow, trafficking and top-down direction, resulting in conflict and systematic breakdown.

Change Management Integrated in Stages
Transitioning to a new status quo in stages helps integrate change gradually.

As the divisions vary, allowing each division to submit their own plan to reach their growth potential helps provide challenge, offers a level of autonomy and purpose and gives employees a sense of control over their destiny, helping alleviate resistance in growth planning.

With each division being held accountable for submitting basic quarterly plans, metrics, with various metrics, formulas and budgets, we gradually bring the divisions together through formulas and planning rather than management.

The process would not begin as an all encompassing strategy but would be piloted under the Video division, with integration as part of a work flow process.

Video Division Growth Strategy

Stage I Division Growth Strategy
While upholding the mission and vision of [Name Omitted] Agency, and promoting the message of the
[Name Omitted] brand, the [Name Omitted] Studio will present a growth strategy plan for the next 6 month focusing on a
balance of customer acquisition strategies that increase both revenue and repeatable clientele for steady revenue stream.

Growth Strategy Codification
Our growth strategy will include:
- As-Is strategy canvas and buyer utility map market assessment
- Buyer Persona Codification
- Our position in the market and our UVP
- Pricing Matrix and Structure for Products
- Metrics and selling strategies

Work Flow/Process
[Name Omitted] Studios will set up work flow, process and trafficking for operations
Workflow will include time for CAC and LVT

Promotional Channels and Content
[Name Omitted] Studios will control and create:
- Promotional content
- Sales collateral
- Social Content and Channels
- Public Relations
- CTV, OTT Advertising
- Wire PR Deployment
- Advertising Budget 20K

Metrics/Measurement
Objectives and Key Results Including Tasks
Benchmarks
Metrics for progress

Summary of Pilot Program
[Name Omitted] Studios will act as a
self administering division of Client [Name Omitted],
self promoting,operating inside of the agency with
the penultimate goal of growing
Client [Name Omitted]