

2016 Producers Club  
“Better Your Best”  
Contest Essays



[www.technologymarketingtoolkit.com](http://www.technologymarketingtoolkit.com)  
[www.robinsbigseminar.com](http://www.robinsbigseminar.com)

## **Technology Marketing Toolkit, Inc.**

**2016 IT Sales And Marketing Boot Camp**

This material is copyrighted by Technology Marketing Toolkit, Inc. ALL RIGHTS ARE RESERVED. No part of this book and accompanying audio program may be reproduced, shared, or transmitted in ANY form or by any means, electronically, verbally, or mechanically, including photocopying, recording, or by any informational storage or retrieval system without express written permission from the publisher.

### **Published by:**

Technology Marketing Toolkit, Inc.

751 Cool Springs Blvd.

Suite 104

Franklin, TN 37067

USA

### **Disclaimer and Legal Notices:**

While all attempts have been made to verify the information provided in this book and accompanying audio program, neither the Author nor the Publisher assumes any responsibility for errors, inaccuracies, or omissions. Before implementing these strategies, you must be aware of the various laws governing business transactions, marketing, or other business practices in your particular geographic location as some of the suggestions made in this book and audio program may have inadvertently introduced practices deemed unlawful in certain states, municipalities, and countries. This book is not intended for use as a source of legal or accounting advice. In all cases, you should consult the services of a professional, licensed attorney in all matters pertaining to the operation, delivery, and marketing of your business and services.

# 2016 “Better Your Best” Contest Essay



## Bill Ooms BSS Consulting

Monthly Recurring Revenue Up \$33,093  
Gross Sales Up Over \$400,000  
Doubled His Business In 3 Years

*“We recently celebrated our 20<sup>th</sup> year in business. Prior to 2015, I had never had a million dollar year. Well, we ended 2015 with \$1,356,219!!! It can be done!”*

## Better Your Best 2016 Essay

Bill Ooms

Is marketing really worth it? Is it really possible to double your total revenue within three years? Do my people, products, and processes have to be perfect and well defined? Yes, Yes, and NO.

In 2012 I ended with 653K and came up with the BHAG of \$1 million, and I thought that meant a Big Hairy Audacious God sized goal, since it seemed like it would take a miracle to reach. After only two years I ended 2014 with 955K, and was thrilled to be so close to that previous goal. In 2013 I started an Accountability Group called 2DoubleIT, with our goal of doubling our business in 2 to 3 years. A big part of reaching your goal is to have a reachable BHAG, write it down, and share it with others. At the end of 2014 my BHAG for 2015 was to have over 50% growth in total revenue, and reach \$1.5 million.

We began 2015 with newsletters, canvassing and a lot of networking by our new sales person. We slacked off on the marketing for the first three months as my marketing person left for another opportunity. In March we were named Small Business of the Month by our Chamber, and around that time my son came back to once again kick start our marketing. In April we had a Chamber Business Expo that brought in our biggest client, through meeting the receptionist at the show! We then started capitalizing on being named Small Business of the Month and on the book that was released almost a year earlier. These two items, along with all the campaigns and Lunch n Learn material from TMTK, gave our marketing a lot to work with. Almost two thirds of our growth was organic from our marketing efforts. So, yes, marketing works, and lays the foundation for our sales processes to close the deals!

Our accountability group wanted to double our businesses in 2 to 3 years. It started with writing down your goals, and what you expected your business to look like in that time. Our painted picture was a good representation of that, and we shared it with staff and clients – another great marketing piece. Since I was serious about reaching my goal, we were always on the lookout for a small IT firm to acquire to help add revenue and profit. In August we acquired a small IT firm that added about one third of our year end growth and three great employees. From the end of 2013 that would mean I needed \$1.3 million by the end of 2015. Well... we ended the year with \$1,356,219!!! It can be done! Instead of making excuses about staff, physical limitations, community size, etc., I am focusing on being positive, goal oriented, accepting change and always improving. So now the next goal is \$3 million by the end of 2018, a little more than double, and certainly a BHAG!

In 2015 I have grown from 5 employees in January to 11 at the end of the year with the need for another tech. We have added several new large and small clients during the year. Some of these clients are large enough to need someone almost dedicated for a period of time until they were moved to our standards, and the initial projects and issues were resolved. Certainly processes, standards, our RMM/PSA and other tools are all important. For me, a big challenge seems to be the staff and interactions as growth requires changes in the organization including roles and who reports to who. And there is an overlap of the discussion of processes and roles, as who does what changes. And we seem to be changing our processes (by improving and sometimes implementing new ones) all the time! Change is necessary, improvement must be ongoing. An understanding that you must grow your staff, increase your product offering, and improve your processes is needed in order to grow your bottom line!

In September we celebrated our 20th year in business. It was an honor to have many people come and celebrate the day with us including clients, our local Chamber, a couple state Representatives, and many friends. When we started in 1995 our clients worried about their cash being stolen and kept it in a safe in the office. Over time they began worrying about their expensive computers being stolen and got security systems for their offices. Today it is their data they are worried about, and how to protect their systems from hackers and malware from the internet. What I have learned and implemented over the last 7 years is that executing the marketing, having clear goals, and a willingness to change and improve your business, can put your business on whatever growth path you set for it!

## Marketing Activities for 2015

Bill Ooms

### **NEWSLETTERS**

We sent out a newsletter every month. We had it printed and mailed so it would arrive around the 1st of every month. We have sent out a monthly newsletter every month since December 2008. This April we re-designed our newsletter to have a more professional layout and included new sections such as "Client Spotlight" and "Client Testimonials".

This year we also began using a new printing/ mailing service that reduced our costs for mailing and got rid of a significant amount of man hours spent preparing the printed newsletter for mailing. We are currently sending the newsletter to 460 addresses, up from 377 in 2014. We get an extra 50 copies printed that we keep to include in the Welcome Kits and for other promotions.

### **CAMPAIGNS**

-VoIP Postcard: Mailed out a VoIP postcard which included a free phone audit.

#### **Bad Date Letter-**

We sent out the Bad Date letter in 3 sets during the first half of the year. Each time we mailed them to a list of 50 highly targeted prospects and then did follow up calls. We followed the directions given by Robin Robins exactly on how to mail it out. We got numerous appointments from the different mailings.

#### **Small Business of the Month postcard-**

We knew a couple weeks ahead of the award ceremony that we were the Small Business of the Month for March 2015 so we sent out a postcard announcing the achievement and also inviting our clients and prospects to the ceremony.

#### **Small Business of the Month award and ceremony-**

This was a great event that members of our Chamber, State Representatives, our Mayor, and clients attended. We were mentioned in our newspaper, talked about on the Chamber website, and had a large Small Business of the Month banner that we were given to display in our lobby for the month.

### **Small Business of the Month Cookout-**

After we won Small Business of the Month in March we had a cookout at our office to celebrate. We invited all of our clients and the community to attend. It was a great time of celebration and giving thanks for the recognition.

### **Lafayette Chamber Business Expo-**

Was a part of the Lafayette Business Expo. Had a TV and computer set up playing different videos about our company on loop. We made lots of connections with existing clients, prospects on our newsletter list, and got new leads.

### **Kokomo Chamber Business Expo-**

Was a part of the Kokomo Chamber's Business Expo. This helped show our presence and get our name out in the Kokomo area.

### **Client Appreciation Lunch-**

We sent an invitation to all of our managed clients, large break/fix clients, and 5 hot prospects. We ended up having over 35 clients attend and a few of the prospects attended as well.

### **Managed Clients VoIP Bank Bag-**

We sent the Robin Robins VoIP 2 letter campaign to our 22 managed clients. We followed the campaign directions exactly and sent the 2<sup>nd</sup> letter in a bank bag. We then followed-up with a phone call or stopped in.

### **Painted Picture and Welcome Letter to Kokomo-**

As a way to introduce ourselves to the newly acquired Kokomo clients we mailed each of them a welcome letter introducing ourselves and explaining the acquisition, a copy of our Painted Picture document, and a copy of our newsletter.

### **Rate Change Letter to Kokomo-**

In August we sent a rate change letter to the Kokomo clients. They were all break/fix and were at an hourly rate of only \$80. We mentioned that it would be going up to \$105 by September 1<sup>st</sup> and would go up to \$120 by the end of the year and then gave information about joining one of our support plans.

### **20th Anniversary Celebration-**

September 2015 was our 20<sup>th</sup> Anniversary celebration. We mentioned it in the two

newsletters leading up to the event, sent out mailed invitations to everyone on our newsletter list, and sent press releases to local media. We had the Chamber do a ribbon cutting ceremony so they advertised the event as well. We put up a new sign for our office and did some minor remodeling inside the office. We had a cookout outside for the event and a “computer smash”. It was a great turnout.

### **Eyeball Campaign-**

We sent out Robin Robin’s Halloween Eyeball campaign the first week of October. We sent it to 42 businesses in Kokomo that were on our top prospect list (these are businesses that were customers of the company that we acquired that we are trying to convert from break/fix to one of our managed service plans). We also sent the campaign to a list of highly targeted prospects in Lafayette.

### **Lunch and Learn seminar Kokomo-**

We held our first lunch and learn in Kokomo “How Protecting Your Technology Can Eliminate Risk, Increase Productivity & Reduce Downtime”. We sent an invitation letter to all of the customers of the company that we acquired and not only advertised it as a free educational seminar, but also a great way to meet the staff of BSS. We also sent 3 emails over the course of a few weeks to those customers as well. We then utilized the Kokomo Chamber and had something put in their monthly newsletter and also did a “Member 2 Member” email where we were able to get an invitation emailed directly to every member of the Chamber. We had 8 people end up attending and got 2 appointments out of it.

### **Lafayette Chamber Newsletter VoIP-**

We put a blurb in the October Lafayette Chamber newsletter about our VoIP services. It mentioned the free phone audit offer and went to a landing page. We got 1 VoIP deal from it.

### **Referral Campaign-**

We sent out Robin Robin’s Referral letter that is found on the dashboard to all of our managed clients. We sent it around Thanksgiving and included a \$5 Starbucks gift card with each letter that was mailed. The offer we included was \$100 cash for any qualified referral (one that has at least 1 server and 4+ PCs) that makes an appointment and an iPad if that referral becomes a managed client. We got a few responses saying that they unfortunately did not have anyone to refer at this time but would keep it in mind. We ended up getting 2 referral forms faxed back to us with a total of 6 referrals.



### **Testimonial Campaign-**

While at a Producer's Club meeting we did the Ask campaign where we emailed our top clients and asked them if they could answer a few simple questions for a prospective client. We then in turn would donate \$50 to the charity of their choice. We ended up getting 8 fantastic responses and not only added a few pages to our testimonial book, but also donated \$400 to various charities!

### **Christmas Cards-**

Sent cards to all of our managed clients, top break fix clients, prospects on our Kokomo list, and vendors

### **Journal & Courier Readers Choice-**

We were once again nominated for our local newspaper the Journal & Courier's Reader's Choice Awards. We were one of 4 tech companies nominated. We posted on Facebook and sent out 3 emails over time asking our clients to vote for us. We did not end up winning, but got a great amount of votes.

### **Tech Avengers-**

Thanks to Robin Robins we were able to get some really great photos at the October 2015 Producer's Club Halloween party. Bill dressed up as Captain America tying it in to our business by making the shield advertise our Protection Plus plan. With the photo and costume our office created a fun video that we used in our application for Small Business of the Year, as well as got a 6 foot cutout of Bill in the costume. While we have only used in for the Small Business of the Year application so far, we plan to create a campaign this year advertising our Protection Plus Plan using these items.

---

## **MARKETING MATERIALS**

**Client Wall** – Last year in our lobby, which is about 16'x16' we took one wall and created 5x7 framed 'awards' for all our managed clients, and those break/fix clients that have been with us for 10 and 15+ years. We highlight with an 8.5"x11" frame of the most recent two new managed clients. We continue to update and add to the wall throughout the year as we get new clients. We get a lot of comments on the wall, and it has added a lot of credibility when existing clients or new prospects come in and see some big, some well know, and other small businesses on the wall listed as our clients.

**Client Testimonial Booklet**—This year we updated our testimonial booklet. We gave it a professional design and it is now printed on glossy paper and bound in the middle. It includes ALL of our managed clients listed as references and over half of the managed clients have contributed a testimonial. The new updated version also includes many new testimonials we gained through the work shop at Producer’s Club. We include it with the Welcome Kit and most prospects tell us they have called an industry or person they know, and have been impressed.

**Painted Picture**—We created a new version of this document with an updated design and content. The original version was a big effort we did as part of our accountability group. It pulls together our mission, values, goals, and shows what is important to us as a business and where we are heading. We have used this document in our Welcome Kit as well as a way for the clients in Kokomo to get to know us when we first acquired the clients there in August.

**Website** —We continued to update our website and use landing pages for specific campaigns. We also uploaded all of our newsletters from the year so people can download them in PDF format. On the front page we added some of our accomplishments such as 20 years in business, small business of the month, and the two Amazon best-selling books.

**Free Network Health Check Postcard** – We created a very professional looking sleek designed postcard for a 2 free hour network health check. We include this in the Welcome Kit and hand it out to prospects.

**VoIP Phone Assessment Postcard**- We created an oversized postcard that points out the main advantages of VoIP and has a free phone system audit offer on it. We include this in our Welcome Package and have mailed it out to prospects.

**Christmas Baskets-**

Hand delivered treat baskets that we put together. We gave them to all of our managed clients, top break fix clients, and top 17 prospects in Kokomo.

**Super Bill** – We got a life size cutout of Bill in the Avengers costume he wore during the Producers Club Halloween Party. We put “BSS Protection Plus” on the shield to advertise one of our managed plans. We used this as a display for the Small Business of the Year application.

**Soft Cover Book** – Use the RR soft cover free book and called it “What Every Business Wished They Knew BEFORE They Hired Their IT Guy”. We include this in all of our Welcome Kits.

**Amazon Best-Selling Books**- We include “The Tech Multiplier”, “The Essential Guide”, and an “Amazon Best-Seller” bookmark in every Welcome Kit.

**VoIP Testimonial Sheet**- We were able to get a great testimonial from a client of ours that has our VoIP system. We got this testimonial during the Producers Club exercise where we emailed all of our clients asking if they could provide a testimonial. We designed a one sided flyer on glossy paper with information about VoIP and the client testimonial and give this out with everything regarding VoIP. The client who provided the testimonial is well-known and respected in our community and their business actually won Small Business of the Month as well during 2015.

**BSS Folders**-We continue to use the professional looking folders that we made last year. We include these in all Welcome Kits (we generally put a few past newsletters inside of them in the kit) and we also use them to hold materials for our lunch and learn seminars.

**Shock and Awe box**- We use large red boxes, put a printed sticker on the front with our logo and the prospects logo, and include our About BSS book, Testimonials book, two best-selling books, and a folder with recent newsletters in it. We customize the letter and sometimes the other contents based on who is receiving it.

# 2016 “Better Your Best” Contest Essay



## Dave Johnson Portland Managed Services

Net Profits Up 583%  
Monthly Recurring Revenue Up \$26,597/month

*“In 2015, I decided to take Robin’s advice that ‘Top line if for vanity and bottom line is for sanity.’ Combine that together with “Marketing Oil Wells” and a “Pumpkin Plan” for my business. I am pleased to say that this combination worked beyond my expectations and I had more fun and peace of mind in 2015 than I ever had running the business.”*



**PORTLAND**  
MANAGED SERVICES  
A Division of Netropole Inc.



## 2016 Essay

When I attended my first Boot Camp, I had two overwhelming feelings – one was that this was exactly what I needed to build the business that I wanted to have, and the other was dread that I was going to go home and tell my business partner (and wife) that I had spent thousands of dollars that we really did not have on products and services that she had never laid eyes on. Getting out from under that was step one toward changing our business and our lives.

Step two was actually implementing the plan on a consistent, predictable basis, and unfortunately for all of the reasons that we all know, this took years to do.

We came into 2015 doing both managed services and SharePoint development. We found that each line of business added value to the other and was of the things that set us apart from our competition. On January 2<sup>nd</sup> we found out that all of our SharePoint projects had been put on hold, and that overnight we were not going to receive the \$150,000 that we were counting on in Q1.

While this was unwelcome news, it was the best thing that could have happened to us. It forced me into a corner and to apply Robin's Oil Well concept to our business. While I had convinced myself that the time that I took from Managed Services (our oil well) and applied to SharePoint was time well spent, I was wrong, and I was forced to do what I should have been doing all along, and focus on the Managed Services business.

So what does focus mean? For us it was looking at the business and applying things that I had learned over the years to:

- 1) Refine our messaging. Focusing on the value that clients get from us at the end of the day rather than how we achieved that value (emotional decision making rather than logical). Messaging is around shifting risk and responsibility from the client to us, and being on the hook for 100% satisfaction. By taking somewhat long-winded concepts and boiling them down to the kinds of short, tight, emotional messages that Robin delivers so naturally.
- 2) Shorten our sales cycle. Rather than have an undetermined number of touch points from initial contact to contract, actually mapping the process out so that we have no more than 4 touch points from call to contract. By being purposeful and focusing on the end result that we wanted, we achieved a 100% close rate on all of the prospects that we wanted and reduced the time and cost of customer acquisition, all of which lead to an outstanding bottom line in 2015.
- 3) Be consistent in our marketing efforts. I have learned that marketing is not a transient event, but a series of activities that if done right is far more powerful than the sum of it's parts. This year we



**PORTLAND**  
MANAGED SERVICES  
A Division of Netropole Inc.



scheduled and delivered every newsletter to reinforce the brand and the value that we deliver.

- 4) Get rid of non-producing employees and replace them with ones that are passionate, committed, and are proud of the work that they do. You know that you have the right people in the right place if you feel that you need to work hard to maintain their respect. If you think that an employee would not notice or care if you cut a corner here or there, get rid of them. If you come into work and feel like you would not miss an employee if you never saw them again, get rid of them.
- 5) Top line is for vanity, bottom line is for sanity. This was the most important area of focus for us this year. Rather than growing for growing's sake we focused on maximizing the profitability with our existing client base. By reducing the cost of client acquisition and focusing on our existing client oil wells, we were able to achieve net profits that were unattainable in over 20 years of being in business. As I told my wife and partner, "It is a lot more fun running the company with money in the bank than without..."

It has taken a long time to get to the point that we are today with a very healthy stable of loyal clients, top-notch employees, and a very profitable business. Focusing on our core business oil well, refining the processes that work, and getting rid of the activities and processes that did not serve us made all of the difference for us in 2015.

I can say without reservation (as have hundreds before me), if I had not attended that life changing boot camp, joined producer's club, and listened and done what Robin and my colleagues in TMT told me to do, I know that we would have gone out of business long ago.

The biggest personal benefit that TMT has provided is an environment that teaches, supports, and constantly challenges members to do better, be smarter, and be personally responsible for their success. I could go on about all of the things that I have learned and value (other than marketing), and I think that it is important that potential new TMT and PC members know just how much they are getting, but I am over my 750 words...

The next 1-5 years will deliver continued growth for us as a business with a fairly radical change from traditional MSP support to a consulting role for clients using cloud hosted applications and services. We have been successfully making that transition already, and I see a complete change taking place in 2 years or less.

Personally, the business will continue to provide the income and time flexibility that has allowed us to do and see things that a work-a-day job would never have done, and will only get better as we continue to focus on the bottom line.



**PORTLAND**  
MANAGED SERVICES  
A Division of Netropole Inc.



**NOTE:**

Please keep in mind that spent all of the years prior to 2015 with the goal of growing the top line of the business to over \$1 million. Only after achieving that and having some epiphanies during Boot Camp and PC events did I realize that this was a mistake. It is easy to build the top line and as a result bury your business, and I have seen my colleagues do it many times over these years.

I started 2015 with the commitment to myself, my family, my employees, and my Accountability Group members that I would shift the focus from top line to bottom line using all of the knowledge and experience that I have gained from TMT. I went through all of the notes that I had taken over all of the years of meetings and training and came up with a game plan that I thought would work. The solution was right in front of me and all that I had to do was connect the dots and follow the plan.

It worked. Total revenue was up 14.8% from \$1.1 million to \$1.26 million and Net Profit (after all bills paid including my salary and benefits) was up 460.6% from \$36,583 to \$221,884.

Had I not had the resources, I would still be trying to make payroll every month, be late getting home, not getting enough sleep, and having spirited financial discussions with my wife.

Nothing would make me happier to have a way of giving back to the organization and helping others get to the space that I find myself in today.

Thanks for Everything,

Dave Johnson



**Marketing Initiatives 2015**

**Shock and Awe:** We instituted a sales process that includes sending a shock and awe package to each qualified prospect prior to our first face to face meeting. We ask them to review the information contained within and to call and check our references before that first meeting.

Before the first meeting, our office manager calls to confirm that they got the package, asks that they check the references before the meeting, and confirms the meeting date and time.

The net result of this effort is that our close rate for qualified prospects that get the shock and awe package was 100% for 2015.

**Monthly Newsletter:** We mailed out a printed, branded newsletter with Dave’s Corner Column to our list of 1200 clients and prospects. From these mailings we received 3 calls from prospects that became 3-year Managed Services clients.

Monthly Newsletter Cost	New Monthly Recurring Revenue	Monthly Net Benefit
\$720	\$4,152	\$3,432
Annual Newsletter Cost	New Annual Recurring Revenue	Annual Net Benefit
\$8,640	\$49,824	\$41,184
3 Year Newsletter Cost	3 Year Recurring Revenue	3 Year Net Benefit
\$25,920	\$149,472	\$123,552

We are in the process of cleaning our list using Robin’s list cleaning script. We are removing the people who would rather not get it and using the contact to invite each person to an upcoming security lunch and learn.

I am reminded of the value of the newsletter by the fact that multiple times per year recipients who are not current customers go out of their way to notify us that they are moving and to make sure that we update their address so that they do not miss any upcoming editions.





**Pumpkin Plan:** We added additional services to our arsenal and created the Pumpkin Plan matrix for our existing customers. For all new services we took the cost objection off of the table by pricing all of the new offerings as a monthly incremental cost that had no up-front capitalization for the customer.

An example of this is on premises email archiving. We provide the solution, and the client pays for it on a monthly basis with a 3 year agreement.

Our up-front cost for hardware, software, and licensing:	Monthly client cost for service	Our Monthly Cost	Our Monthly Net Profit	Our 1 <sup>st</sup> Year Net Profit	Our 3 Year Net Profit
\$2,000	\$799	\$150	\$649	\$5,788	\$21,364

**Robin’s Sales Process:** We began the year by adopting Robin’s sales process and focused on pre-qualifying prospects based on our ideal criteria rather than the broad criteria that we have used for years.

We also looked at the process as a whole and analyzed past client presentations (both successful and unsuccessful) and compared them to the sales process outlined by Robin in Producer’s Club and Sales-A-Paloosa. This allowed us to restructure the opportunity evaluation process so that we did not waste time on prospects that were not going to fit our strategic goals.

# 2016 “Better Your Best” Contest Essay



## Ilan Sredni Palindrome Consulting

Gross Revenues Up \$920,819

Net Profits Up 57%

MRR More Than Doubled In 3 Years

*“We learned from previous failures and implemented a variety of marketing and sales strategies throughout the year. We were careful not to bite off more than we could chew in each campaign. Having the right systems in place has allowed me to work in the business, not on the business!”*

After a few years of having no significant growth, from 2008 to 2014, the gross sales and net profit did not change much leading to a significant increase in my frustration level, I was determined to change. As the father of 4, with 2 children nearing college age and 2 aging parents and grandmother, there was little choice. I knew I could not afford to give them what they needed. As immigrants to this country, my parents did not do the best job planning for their future, so much of the responsibility falls on myself and my 2 siblings. I felt the pressure to make something happen...or else – but I feared what else could be. My father had failed in multiple businesses and after numerous serious illnesses, I decided to have him work for me so we can watch over him and remove his stress. With this in mind, 2015 would have to be a different year, I could not afford to fail. As a cancer survivor, there are not many challenges which I find daunting, but having 14 more families, including my parents and grandmother counting on our success did create a gut check time.

I took a step back and took notice that we had great resources at our fingertips, but we had failed to implement them properly, 2015 would be different!! The first change, create a game plan: decide what to do and how it would be done, assign it and manage it. I followed the mantra, you can't manage what you don't measure.

Our sales strategy matched that of pot luck and marketing was something we talked about, often, but never really fully implemented well. We did have some marketing activity in order to keep ourselves honest and to justify our TMT membership, but it was not something we managed properly.

I was fortunate to attend Verne Harnish's workshop on Scaling up (given by TMT) and learned a lot about how to implement what we had learned from the book!! Having the ability to discuss the ideas directly with Verne and one of his top coaches, Les, was worth 100x invested in the workshop. Shortly after, our accountability group read Scaling Up together and we added a few more concepts to create significant accountability in the business, including sales and marketing. Additionally, I thought of Mike Michalowicz's book, The Pumpkin Plan, and thus we began focus on the better clients. The lessons learned from authors and the related Producer Club meetings were instrumental mapping the right path in 2015.

In December 2014, we hired and trained salesperson. We added metrics for him and the rest of the team, following TMT guidelines. I began by implementing 2 very critical metrics that everyone had to be aware of and measured it weekly– Products Sales and Consulting Fees. I knew that the agreement income had little fluctuation, but those other numbers, properly managed would drive our profitability. By having everyone on the company focus on those two numbers, I was able to focus on sales and marketing. Having a trained salesperson was helpful and so we began marketing and following the processes outlined. Although we did not end the year with the same numbers, our MRR increased by 42.3% during 2015. Product margins increased from 10% to almost 30% during 2015.

We learned from previous failures and implemented a variety of marketing and sales strategies throughout the year. We were careful not to bite off more than we could chew in each campaign. We picked our lists carefully and made sure to follow up on each campaign. Continuously updating our lists and recalibrating before the next newsletter or mailer. Each lead was properly documented and managed carefully to assure that we followed the right process. Having the right system in place allowed me to work on the business, not in the business.

TMT as a whole has great value and in particular, the value associated with the Producers Club is immeasurable. I have learned so many great things from members, Better Your Best Winners and finalists, Marketing Geniuses, speakers and Robin are all part of our success, growing revenue 51% (\$2,721,976.38 from \$1,801,487.46) and net profit 57% (\$228,487.48 from \$145,354.21).

Today, the outlook for 2016 looks better than ever and our goal is to reach \$5MM by 2017 and \$10MM by 2020. Having set our BHAG of 200 Managed services clients by 2020 in early 2015 helped set the path, and it now looks well within reach.

## 2015 Marketing Campaigns and Strategies

**Website:** After a quick talk with Robin in Nashville, we launched a new site, focused on marketing to law firms that had 20+ users. With this focus, we launched, [www.attorneystechservices.com](http://www.attorneystechservices.com), a Robinized website that focused content which lawyers understood. We leveraged the relationship between Pronto and Technology Marketing toolkit and did not have to spend any money developing the site.

**Monthly Newsletter:** We refocused on our marketing lists and continued to reach them with email newsletters, paper newsletters and LinkedIn networking campaigns. These efforts helped deliver over \$6,000 in MRR, in 2 and 3 year contracts while only costing \$1,000 MRC – **240% ROI**.

**Direct Mail campaigns:** Amongst the campaigns that we did are the Godfather, Aspirin, Band-Aid, Nuts campaigns, and Bad Date Letter. Although they did not generate any direct deals, they did dovetail into our involvement with the Association of Legal Administrators (ALA) and our legal client focus. Name recognition and presence were key in other deals. We also did a BDR email campaign, which cost us \$45.00 and returned \$600.00 MRR – **14,400% ROI**.

**Seminars/Expo:** Our involvement with the ALA had a total costs of \$3,090.26, including our participation in their ALA Expo, which was the typical vendor showcase. We had to be different! We rented a couch, hired a masseuse and massage chair and handed out scalp massagers/scratchers. Our message was simple, please relax, we'll take the stress off your head. A line quickly formed which allowed us ample time to meet and greet everyone. The contracts signed generated from this effort generated over \$3,733.00 MRR – **1,740% ROI**.

**Networking:** I continued to network and attend non-technical and non-industry related networking opportunities to meet new people and find new opportunities. One of largest clients came from a "lunch-and-learn" class I attend weekly. Involvement in the networking group costs \$150 every few weeks to cover lunch, about \$900. Our current agreement is for \$7,150 MRR- **11440% ROI**.

**Client Referrals:** We continued efforts to farm our referral network, leading to two new clients and \$2,000 in MRR – No cost – **Unlimited ROI**.

**Considered Expert:** Being the expert carries big weight. Being featured on Telemundo National News as their technology expert helps with client introductions and closing deals. Although there is no way for me to track exactly how this helped in ROI, I know it was instrumental in closing some deals.

**Google AdWords:** After struggling to control the spending in my area, we had turned off Google AdWords for much of 2014. In 2015 we outsourced AdWords management and spent a



total of \$6,471.96. We picked up one project, totaling \$237,539.14 in hardware and consulting revenue, **150% ROI**, after reducing costs.

**Other Marketing Strategies Used:**

**Online Shock and Awe:** We used this tool before every initial visit. The clients often commented how informative it was and we could see that many times it may have been circulated within the company by the number of opens.

**Hassle Free Book:** Used the book for every client visit. The reception of the book was always welcome and definitely a differential over other competitors.

# 2016 “Better Your Best” Contest Essay



**Jason Abel**  
IntermixIT

Revenues Up \$624,900  
Monthly Recurring Revenue Up \$45,101/month  
Net Profits Up 556%

*“We found inspiration again. With my Accountability Group and the awesome IT business owners around me now, I have found people that knew what we were going through and wanted to help.”*

I would love to say we tried this campaign and that campaign, and it yielded us thousands of dollars in MRR. This just isn't the case. This essay isn't going to even talk about what campaign worked and what didn't, however, it will talk about what changed and led to us to successfully double our revenue in 2015.

If you notice I used the term "we" instead of "I" - this isn't about "Me" it's about "Us". My team. My employees, business partner, and my accountability group. Honestly, without them, I would be in the same place I was in early 2014, broke, pissed off, and depressed.

So let's start from the beginning. I started my company in 2003, much like everyone else fixing broken PC's in my neighborhood. I was "lucky" enough to land a deal with Dell doing warranty part replacements. That put me in front of a lot of different business, not that I was supposed to, I dropped my card off at every one of them, and eventually landed a few as clients. Fast forward to 2007, I was making cash, I mean a lot of cash, like close to six-figure cash replacing parts and doing break-fix work. But while I was BANKING, I was over worked, tired, and not able to do much more besides work. I needed help. I needed someone that would help me take my business to the "next level" and that cared as much as I did. I needed a partner not an employee. I was lucky to find that guy. And I'm still lucky as all hell that I have him on my team as my partner and equal. *Moving right along...*

In 2008 we heard about this whole managed services thing, we knew we wanted to do it, but had no idea HOW to do it. We invested heavily into RMM, PSA's, you name it we probably bought it. We also discovered Robin Robins. We found her website and instantly thought she was talking to us, holy shit this chick knows exactly what we need to do to make millions! We need this – we need this now! We signed up on her "Silver" level plan and away we went.

After going through Managed Services Blueprint, we were ready to sell-sell-sell. We were convinced that everyone was going to buy managed services, we found the golden ticket! Who should we approach first? Our best break fix client of course. They have been clients for years, why wouldn't they buy this?? The appointment was easy – I memorized Robins selling script – I was ready to collect my cash. I arrived at Starbucks across the street 60 minutes early to prep, I was ready for anything they threw at me. I walking in into the meeting confident, what I wasn't ready for was the sticker shock. After my pitch, she laughed. She laughed hard! "Jason, we can't afford this", she said. "But you NEED this!" (I didn't really say that but I wanted too). My best client just laughed at me, literally laughed at me. Talk about a deflating feeling. I couldn't understand why they weren't throwing their money at me. Fact was, I wasn't selling any value. I was trying to sell them a service plan that was double their current expenditure, without showing them anything of value in return.

It took us almost 2 years to sell \$7k in MRR. Yup, two years - \$7k – pretty shitty. Between 2010-2012 we were lucky to break \$200k in revenue. With overhead costs and shitty financial advice, my Partner and I were making less than \$30k a piece and shelling out thousands personally at the end of the year in taxes. We had long ditched Robbin Robbins, why would I shell out the monthly fee when we can't afford to pay ourselves, yet alone taxes?

This nightmare continued for a couple more years, until 2014 to be exact. We managed grow to a whopping \$17k in MRR, but nothing changed. I was depressed, pissed, and ready to quit. Every day I wanted to quit! Fuck this, I'll work at Lowes or do Dell calls! My Business Partner was in the same boat, god bless him, I had a wife that worked and got a paycheck, he was the sole bread winner.



We both hated our professional life, hated our business and really just wanted to quit. Who the hell works 60-80 hours a week for peanuts and a big ass tax bill at the end of the year? I don't know why we didn't quit. For some reason we always got back up and tried another approach.

In 2014, we decided things had to change. We were sick of losing, being depressed, and hating the business we spent so much time building. What do we do? We need sales!! YES! Of course, we need more clients, after all, more clients equals more money! How do we get sales? Marketing, yes of course marketing. But we tried that marketing thing...it didn't work. Did we do it right?

In 2014, we decided to max out the remaining credit card we had and attend Robbin's Boot Camp. We went in with a plan, we commit to consistent marketing or we fold. No other option. While there we committed to the Producers Club, knowing damn well we couldn't "afford it" we had nothing else to lose, but we had to commit, no more joining then quitting. We are in this for the long haul or at least until we can't pay our bills. During Boot Camp I joined an accountability group, and away I went, hell bent of doing everything it took to turn this ship around. I committed to newsletters, postcards, campaigns, SEO, I took every nugget of info from my accountability and applied it to my business. Shock boxes, pillow boxes, onboarding boxes. Every damn good idea, I implemented. We completely overhauled our MSP offering and the way we sold it and concentrated on adding value. We decided we wanted our MSP to be the "Louis Vuitton" of MSP's. Quality, Client focused IT services. Nobody else in the area can treat their Clients better. No exceptions. Finally that damn light bulb went on!! Finally I got it!

Ok....What was it?

You see, sales wasn't the only thing we needed. We needed a change in attitude. We couldn't run the type of business we wanted, depressed, pissed off, and hating life. It wasn't possible. We needed a complete mental overhaul. We needed to love our business again! We needed to feel inspired again! We found that. I personally found that with my accountability group and the people I surrounded myself with. I found other people that knew what we were going through and wanted to help.

During 2014 we grossed just over \$650,000 in sales, and managed to end the year at just over \$44k in MRR an amazing jump from 2013 where we barely hit \$400k (We added \$27k of MRR from Boot Camp in April until the end of the year – CRAZY!!). Since most of the new Clients we on boarded came at the end of 2014, that led the way for 2015 to be a remarkable year for us. We finished just a pinch under \$1.3 million and grew our MRR to over \$85,000 per month. We DOUBLED our MRR from the end of 2014!

Our success the past couple years isn't all due to marketing campaigns, SEO, or whatever. It's my TEAM. My Business Partner, my Employees, and my Accountability Group. There's no magic path to be successful, you have to want it, at all costs. I personally believe you have to hit rock bottom to get to the top. Hang in there and find your inspiration.

## 2015 Marketing Overview:

A note regarding our branding. We do all our web, marketing, graphic design etc...in house. (I do it personally to be completely honest, I enjoy it, and it relieves stress). Everything matches and has a meaning. Colors, font, logo, they all go together - everything must be uniform and consistent.

**Website Optimization:** We added local landing pages and used a standard SEO WordPress plug in. This immediately increased our search placement. We also added Google AdWords. To date our website has been the single most effective lead generator. I can directly account for closing almost \$30k in MRR from our website.

**Monthly Newsletter:** We committed to our newsletter in January of 2015 to current Clients and Prospects we have previously talked to. I cannot account for any MRR from this, however, I get good feedback.

**TechTips Postcard:** We religiously send out our TechTips postcard to every qualified lead and prospect, roughly 1200 every month. I can contribute many leads to this and have closed around \$2-3k of MRR between a couple clients.

**Q1 Godfather Campaign:** We did the Godfather campaign during Q1 of 2015. We secured around \$4k of MRR and received roughly 10 leads. Full details can be found here:

<https://dashboard.technologymarketingtoolkit.com/User/MarketingPlan/ManageCampaign/Detail/?ID=12517&ReturnURL=%2FUser%2FMarketingPlan%2FManageCampaign%2F>

**Q2 Bad Date:** We did the Bad Date campaign to just over 300 qualified prospects. We did not secure any MRR from this. Full Details can be found here:

<https://dashboard.technologymarketingtoolkit.com/User/MarketingPlan/ManageCampaign/Detail/?ID=12560&ReturnURL=%2FUser%2FMarketingPlan%2FManageCampaign%2F>

### Other Campaigns:

- **Shock Boxes** (These are the best!)
  - **PC Book**
  - **Mouse Pad**
  - **Note Pads**
  - **Testimonial Book**
  - **Free Reports**



- **Pillow Boxes aka Mini Shock Box:** We watch our web analytics daily, if we identify a local prospect and they seem qualified, we show up and drop off our “mini-shock-box”



- **Onboarding Box:** This isn't a campaign, however, anytime a Client is on boarded we send them a custom box with mouse pads, pens, pads, candy, whatever. A goody box basically.



- **Trade Shows:** I have yet to get a decent lead, but we just started doing them.



- **Client Value adds – AKA “The Extra Mile”**
  - Random Cupcake Deliveries
  - “Thank You” Lunches for their office
  - Referral Rewards
  - Holiday Gifts
  - Newsletter Giftcards (Please bring these back, I hate coming up with my own trivia 😊)

# 2016 “Better Your Best” Contest Essay



**Joanna Sobran**  
**MXOtech**

Gross Revenues Up \$924,878  
Monthly Recurring Revenue Increased From  
\$21,451/month To \$247,894/month In 3 Years

*“In November 2012 when we joined Robin, we were pulling in \$21,451 in monthly recurring revenue. Now 3 years later, after learning lots, establishing our marketing “oil wells”, implementing even more, and hiring an account manager, we’re up to \$248,000 in MRR. If that doesn’t make you a believer in Robin, then I don’t know what will!”*

## How It All Started

When it comes to making big changes in your life, the timing is never right, sometimes you just have to take a leap of faith and jump right in. While on maternity leave after having my first baby, I was re-evaluating my life and my career. At the time I was working for an IT company as a recruiter and I was dreading having to go back. I always had the desire to pursue the American dream and become a woman entrepreneur. Even though I had a newborn at home and my partner had just lost his job, I decided to quit my comfortable \$150,000 a year job to finally pursue my true passion.

I took what I had learned and decided to start my own IT company. My vision was to create the type of company that created a sustainable business, with amazing service, happy customers and a great office culture – everything my old company lacked. I wanted to build relationships and learn about my customers and their business and help them create growth strategies for using technology to achieve their goals – not just slap a band-aid on their computer issues. I also wanted to create a company which allowed my employees to grow both personally and professionally.

In the first few years that our doors were open, we floated by on past relationships I had built and referrals from clients and colleagues. Eventually, though, that pipeline started to get smaller. We couldn't just sit around and wait for the phone to ring. We had to get proactive. So in 2012 I did what I thought was the next best thing and hired a ridiculously expensive marketing company. They did a fantastic job designing a beautiful online brochure (aka website). I sat at my desk and waited for the calls to start coming in. To my disappointment, that didn't happen. At the same time I implemented Kaseya after hearing about Managed IT Services. I had no idea how to sell this new MSP business model so I called my Kaseya sales rep. After expressing my frustrations with my current marketing company, he told me about a woman named Robin Robins. I figured, what did I have to lose, and I called Robin's office. First I bought the Technology Marketing Tool and then I joined Producers Club which included a call with Robin. I couldn't wait for her to be amazed by my beautiful, artistic website.

"How many visitors is it getting? How many form fills have you had? What's its conversion rate?" asked Robin. "I'm not sure, but don't you think it looks great, I don't understand what's wrong," I responded. I'm sure you can guess how the rest of the conversation went from there. Robin hit me with a dose of reality that I was ashamed to admit I had never even considered. My big marketing tactic, my website that I spent about \$20,000 to create, hadn't helped me convert any leads. While Robin's feedback on my website was helpful, the value that she really brought to me on that call (and continues to teach me time and time again) is to question EVERYTHING, look at numbers and results.

## How We Got Here

**Do everything with a purpose.** Everyone is busy. Time is precious and you can't waste it on things or people that don't positively affect your life and business. When it comes to MXO, if I'm struggling with priorities it always comes down to this: Is it generating revenue and providing value to our customers and employees? If the answer is no, I have to let it go.

**Focus on what you can grow.** In order to grow big pumpkins, you can't just throw seeds on the ground and hope that some of them turn out to be huge. You have to identify the stronger, faster growing pumpkins and then remove all the less promising pumpkins so you can give the good ones the attention they need. This is one of the first steps I took as a TMT client. I started cleaning house. Are our current clients making us money? Do we enjoy working with them? Do they have growth potential? Will they take our advice and give us referrals? Can we build better communities together?

Mike Michalowicz, the author of the book "The Pumpkin Plan" was a guest speaker at one of the quarterly Producers Club meetings. I was inspired by his "pumpkin" approach for growing a business:

1) Plant the Right Seeds. Don't waste time trying to do everything for anyone who calls you for your services. Instead, identify the thing you do better than anyone else and focus all your attention, money and time on figuring out how to grow your practice doing just that. *We figured out our ideal client and only focused our marketing and sales to attract clients with the right size, values, industries, business needs and IT budgets.*

2) Weed out the Losers. In a pumpkin patch, small, rotten pumpkins stunt the growth of the robust, healthy ones. The same is true of clients. Figure out which types of clients add the most value and provide the best opportunities for sustained growth. Then ditch the worst of the worst...you know the ones who make you cringe every time they call you! *We fired 12 clients and converted everyone else to monthly reoccurring revenue increasing our profits.*

3) Nurture the Winners. Once you figure out who your best clients are, blow their minds with care. Discover their unfilled needs, innovate to make their wishes come true, and over-deliver on every promise. *We implemented processes, hired the right people, developed a leadership team and "The MXO Way"!*

**Start with what you can and just do it already!** At first I was really hung up on having to do everything just right. I'd have a million excuses for why we hadn't started the marketing roadmap. I don't have the time, I don't have the money, I'm going to wait until we get that marketing manager, we're redoing our website, our list sucks, I have a client crisis. Are you kidding me?! Just like when I started MXOtech, there was never going to be the perfect time to start something. I just had to start. Doing something is better than doing nothing. So just do it already. You will learn from your mistakes so you can do it better next time.

**Create a process.** There's a quote by Edward Deming that says "if you can't describe what you are doing in a process, then you don't know what you are doing." One of our biggest transformations after joining Producers Club was our sales process – or should I say lack thereof. Our sales process was virtually non-existent. I had always relied on my personal relationships to grow our company, but I know they could only get us so far. Marketing without sales is like thunder without rain. If I really wanted to build this business, or add additional sales people at some point, I needed to have a solid sales process in place. I took my sales guy and flew to California to meet with Alex from Chartec.

We came back to Chicago on fire, closing 90% of the business that was put in front of us. Now keep in mind, referrals were always easy for me to sell, but when a lead came in through our website or other marketing, I needed to have a great presentation and stand out from our competition. We are at the point now where we'll actually have potential clients complement our sales process. Can you imagine leaving an IT sales meeting and having the potential client asking you for advice on a sales process? Now that's impressive.

Over the past year, we've implemented and started using Connectwise for our CRM and sales tracking.

**Set goals and find people to hold you accountable.** I can't tell you how important it is to write down what you want. It's like a wish list for your business. After I got back from Chartec and implemented our new sales process, I blew the dust off the marketing roadmap and made a list of what I reasonably thought I could achieve over the next year.

One of the best things I've gained from Technology Marketing Toolkit is the relationships I've built with my peers – other CEO's of IT companies that I can count on for advice and to hold me accountable for my goals. Everything from sales to marketing, operations, vision and everything in between. I have an amazing group of CEO's I talk to every week. We've created a safe, non-judgmental environment where we can talk about issues we are facing or our ups & downs. Sometimes that hardest part of facing a challenge is figuring out where to start. Having a group to "report to" has been invaluable to me as an entrepreneur. It's the accountability that has allowed me to achieve an even greater level of success.

**Keep talking.** IT is a business of opportunity, meaning most companies are only going to look for a new managed services provider if what they're currently doing stops working. You need to be there and on their mind to grab that opportunity when it arises. What's the best way to do that? Keep talking. Since joining TMT we've established marketing "oil wells" that we execute on a consistent basis. None of these were perfected right away. We've created a marketing matrix that includes a referral program, bi-monthly newsletters, Google AdWords, monthly tech tips, webinars, speaking engagement and networking events, social media, free reports, blogging and more. It's taken years for us to build up this mix and we're still perfecting them to this day. As I mentioned earlier, what's important is that we're doing something! (See Appendix A for a complete list of marketing campaigns implemented and results.)

**Never stop “wowing” them.** Sales and marketing is a process, not an event. There’s no one thing you can do to get or retain a client, you have to keep wowing them. One of our favorite tools that Robin provides, which we use in multiple ways, is the Shock & Awe. We send the physical Shock & Awe box through the mail prior to our first sales meeting. We include some of our promotional materials, free reports, a copy of our book and other branded tchotchkes. We include a letter that describes the purpose for each item in the box. (Remember, don’t do anything without a purpose, right?) I can’t tell you how many times we’ve gotten to the prospect’s office only to see that blue box sitting on their desk. People love getting that darn box! After the meeting we’ll follow up with the online version of the Shock & Awe. We may take it for granted, but in our experience, prospects are blown away by this tool. And because of the tracking Robin has set in place, we can see how many times they open the link or forward it to someone else. We also use the online Shock and Awe for client and employee onboarding, plus we’ve started selling it to other companies.

Another process we’ve started are quarterly Technology Business Review meetings with all of our clients. These meetings give us an opportunity to meet with our clients on a regular basis and offer them proactive technology recommendations for growing their business, gain referrals, upsell other services and help them with IT planning. Wowing our clients doesn’t stop there. In the past year, we’ve also began a Client Connections program. This program allows each MXO employee a daily budget of \$20 to send a client anything they would like. We’ve sent brownies, manicures, gift cards, pizza and more for occasions like a birthday, baby, or just to brighten up a bad day.

One of the things I’m most proud of is that our calls into the help desk will never go to voicemail. We answer all calls live, no exceptions. Even after hours, our support calls are routed to a company that will answer live, listen to their issue, and contact us appropriately.

## The Results Are In!

In November of 2012 when we joined Producers Club, we were pulling in \$21,451 in monthly reoccurring revenue. Only one year later, we were generating \$62,720 in monthly reoccurring revenue – that’s over \$41,000 that we have added per month as a result of implementing Robin’s strategies. Now three years later, after learning more about what works for us and what doesn’t, establishing our “oil wells”, implementing even more processes for marketing, hiring an account manager, and more, we’ve managed to increase our MRR to \$147,000. In addition we converted our application development clients to the MRR model generating another \$101,000 in MRR. Our MSP and Application Development clients total \$248,000 in MRR. If that doesn’t make you a believer in what Robin is teaching, then I don’t know what will.

### Lessons Learned Recap

1. Do everything with a purpose.
2. Focus on what you can grow.
3. Start with what you can and just do it already!
4. Create and stick with your process.
5. Set goals and find people to hold you accountable.



6. Keep talking.
7. Focus on profitability.
8. Hire great people who will wow your customers and follow your passion.

The bottom line - this program, unlike any other, has taught me how to accommodate growth for my business, give me more time, more freedom and have more fun doing it. Robin's marketing program isn't just about marketing, it really changes your entire business – everything from marketing to sales, core values, your operations, employee retention, new products and services, amazing vendors to help you grow your business and new friends to make it challenging and fun along the way. In fact, since joining TMT back in 2013 we have experienced so much growth that we doubled our staff size and we were proudly voted one of America's fastest growing companies by Inc. 5000 in 2015.

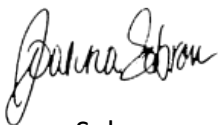
As the President and CEO of MXOtech, it is clear to me that joining Producers Club, and more importantly, IMPLEMENTING the strategies, has changed my company for the better. But the program does not just affect company management; the positive effects can be felt at every level and in every department. I asked my staff, "What changes have you experienced, or witnessed, over the past year as a result of MXOtech joining Producers Club?" and this is what a few of them had to say:

*"Since joining Producers Club I have seen a notable increase in team discussions of new products and services. We have become more experimental and open minded to new products and I think this is directly correlated with the time we joined Producers Club."*

*"When brainstorming new solutions and coming up with innovative ways to solve problems, Producers Club gives you a bigger team to gather ideas from."*

*"The Producers Club has enabled MXO to start getting out of a silo and reach out to other IT companies. It has created a motivating environment for the MXO Business Development team without direct competition. And it enables open communication & trust between Producers Club members."*

Respectfully,



Joanna Sobran  
CEO, MXOtech



## Our Growing MXO Family



### Marketing Campaign and Strategies Implemented

**Bi-Monthly Newsletter:** We sent out a newsletter every other month to our list of prospects, clients, and colleagues. We sent out an electronic version to our entire database of approximately 2,000 contacts and a printed version to roughly 20% of our list made up of “hot” leads and current clients. While it can be difficult to attribute sales from the newsletter we were able to confirm that at least one sale came as a direct result from it in 2015. This client started with us at \$6,290 in MRR, but we grew it throughout the year to over \$10,000 in MRR or \$360,000 TCV\*. We also receive a lot of great anecdotal reactions to our newsletter, such as recipients telling us how much they like to read it and regular participation in our trivia game.

**Google AdWords:** We have completed Robin’s Google AdWords training. In 2015, we can attribute \$15,916 in MRR or \$572,972 TCV\* from Google AdWords. Based on what we were spending each month, that translates into 1,673% ROI.

**Referral Program:** Referrals are the easiest leads to close. We've worked really hard on improving our customer service and continually "wowing" our clients in order to turn them into raving fans. We ask for referrals during our client meetings, remind clients about our referral program in our newsletter and various campaigns, and promote it on our website. Last year alone, we generated \$16,480 in MRR or \$593,280 TCV\* from our referral program.

**Webinars:** We participated in our first webinar in Q4 of last year in conjunction with our JV partner 4med Approved, which provides HIPAA training and education. We used Robin's Cybersecurity Seminar presentation and promoted the webinar to our healthcare prospects as well as 4med's list. The webinar had 105 people registered of which 52 attended. Of those, we received 9 qualified leads. To date, we have closed one sale with a MRR of \$4,320 or \$155,520 TCV\* (one of the largest MRR we closed for the year).

**Technology Business Reviews:** Formal and scheduled Technology Business Reviews (TBR) for our clients is the most successful strategy we implemented in 2015. These meetings provided us with an opportunity to generate additional revenue from our existing clients by upselling them additional products and services. Not to mention building our relationship and gaining referrals. As a result of client TBR's in 2015, we increased existing client product sales from \$135,000 to \$678,000 (402% increase) and existing client project work from \$81,000 to \$154,000 (90% increase).

*\*Total contract value (TCV) based on a 3-year contract.*

**Other Campaigns Used:**

- Monthly Email Tech Tips
- Shock & Awe Box (both physical and online version)
- Speaking Engagement/Events

**Additional Worthy Mentions from the Past (when we joined TMT):**

**The Pumpkin Plan:** In 2013 after joining TMT, we eliminated 13 clients who were bringing in nearly \$45,000 in revenue and made room for 9 new clients who generated over \$127,000 in revenues. These new client also bring me referrals and follow our core values. Plus, I didn't have to hire additional staff to support the old clients who weren't making us money. My existing staff was super happy to work with the new clients and we were making more money.

**Sales Process:** Once we defined (and religiously stuck to) our sales process, our closing rate dramatically improved. Surprisingly, we often receive positive feedback on our sales process from prospects commenting on how impressed they've been. We've been asked on numerous occasions to help other companies revise their own sales process.

**Website:** We "Robinized" our website shortly after Joanna's phone call with Robin, worked on improving the SEO, and started using Google AdWords. We followed Robin's advice and

dramatically improved the language and layout of the homepage. We also filmed multiple videos which we placed throughout the site and strategically placed several “Contact Us” form fills on various pages of the website. We continue to update and refine our website as needed.

**Done for Your Book:** In 2014 Joanna co-authored the group “done for you book” entitled The Business Owner’s Guide to IT & All Things Digital. We promoted the book launch in an email campaign and on social media. As a team effort with the other authors we reached Best-Seller status. Shortly thereafter we hosted a book release event which was attended by over 100 prospects, clients, and JV partners. We created a mini e-book of Joanna’s chapter which is available for download on our website. We also repurposed its content for blogs and other articles. While we cannot tie any direct client sales to the book, it has incited multiple speaking engagements and print, radio, and video interviews for Joanna. The book has been instrumental in helping us build our brand, increase name recognition, and establish Joanna as a leading industry expert.

### **My goals:**

Year one – Develop and hire a sales team including inside and outside sales. Do more speaking engagements starting with Robin and local events.

Year three – Open a second location in a warm state to dodge the cold winters in Chicago. Provide services to customers within our niche only. Develop a product that will bring in leads for MSP internally through our application development team. Finalize 2018 with \$10MM + in revenues.

Year ten – Serve on the Board of Directors for MXO and not work in the business. Inspire people doing Ted Talks on stage. Invest in other businesses and travel the world with my daughters and man (if I finally commit to the lucky fella).  
Joanna Sobran

# 2016 “Better Your Best” Contest Essay



## Konrad Martin Tech Advisors

From \$0/month To \$62,162/month MRR In One Year  
Revenues Up \$159,611

*“We went from virtually a standstill with only referrals generating new business, to a marketing engine that generated over 70 leads, closed 16 brand new MRR deals and converted 2 existing clients to MRR.”*

## Foreword by Robin Robins



Konrad Martin, is a BIG dude (funny how that's the first thing that came to mind as I wrote this). I remember seeing him last year at an event I did in Boston where he came to me and said in a big, booming voice, "Robin, I'm joining your thing. I hope you won't disappoint me." Talk about motivation to make sure he got results! Ha! Actually, Konrad is one of the nicest people you'll ever meet AND incredibly sharp. His accounting background has definitely helped him in business because he's smart enough to take the good without becoming such a tightwad bean counter that he's unable to get anything done. If you want a model for how to take a 100% break-fix company to a managed services model, you'll find his story incredibly helpful.



## Things Were Good, But We Were Limited By Our 100% Break-Fix Model

My twin brother (Kevin) and I started our technology company back in 2005 to help clients with their IT needs. We were both working at the same CPA firm in Boston and felt we could help our fellow CPA clients with technology; from that simple idea Tech Advisors was born. We followed a business model of delivering service similar to that of the CPAs we worked with, since WE were both CPAs. Do the work and bill for time and materials (break-fix essentially). We grew our client base through word of mouth and referrals, not to mention late nights and weekends.

Over a period of 10 years, our company grew from two people to 14 people, our client base grew to 80 clients and our revenues increased by at 20% or more, year after year. We even won the Boston Business Journal Pacesetters award which is given to the top 70 fastest-growing privately held companies in Massachusetts. Things looked good, and from a CPA's point of view, we were killing it. We had grown a technology business to just under \$1.8 million in revenues. However, there were a few problems with our business model. First of all, we couldn't work any harder. Second, every time we brought on a new client, we'd get overwhelmed with work, only to have a big gaping hole in our workload and profits when the project was over. This made it tough to scale. At that time, we thought our biggest problem was figuring out how to consistently bring on new clients and projects to smooth things out, but what I discovered after joining Robin's program was that there was a MUCH more powerful solution to our problem!



### MRR! What The Hell Is MRR?

When I first joined Producers Club, members of my Accountability Group kept talking about MRR. I had no idea what the heck that was, so I secretly went back to research "MRR" in my accounting books, thinking it must be something I overlooked; I was too embarrassed to ask what they were talking about since it seemed like something REALLY important to running a successful IT firm. After really searching and not finding anything, I swallowed my pride and asked my group what MRR was. Monthly Recurring Revenue! "Oh, we don't do that," I said. "We actually sell AGAINST that when clients come to us for support." From our standpoint as accountants, it went against everything we believed in. Second, my brother didn't think we could sell it and was actually fearful about even bringing it to our clients for fear of messing up the good thing that we had. But after talking it out with others who were successful in selling and delivering it, I started to see the benefit to us AND the client. So with the help of Robin and my Accountability Group, I set a goal to create an MRR platform for tech advisors to sell to new clients.



## **How We Added \$62,162.75 In New MRR Revenue In Just 12 Months**

Knowing that we were basically starting from scratch from a marketing standpoint, I decided that we needed to go all in on Robin's recommendations so we dove in. Here is a summary of what we implemented that worked: We launched our new web site to what we thought were Robin's specs, but the leads still weren't coming in. After we requested a one-on-one consultation with Robin, she changed things around, explained the numbers and how to properly track conversions, and got us on the right track to focus on the most important numbers. Surprise, surprise...our web site is rocking now. And thanks to Robin's advice, we are now recording all of our phone calls and tracking against the source of the call so we ensure we answer the phones properly and don't lose a single lead that comes our way. We implemented many other Robin campaigns: monthly newsletter, tech-tip post card, linked-in campaign, Google AdWords (wow!), and others. Please see attached list of campaigns for more detail.



## **We Generated 70 New Leads This Year And Our Sales Funnel Is Better Than Ever**

Over the last 12 months, we have gone from virtually a standstill with only referrals generating new business, to a marketing engine that generated over 70 leads, closed 16 brand-new MRR deals and converted two existing clients to MRR. We added \$62,162.75 in new MRR this year; but more importantly, we've established a solid base of marketing, and the momentum should add another \$100,000 of MRR this year. I have great confidence that it will happen. I owe a big thank-you to Robin and her team, as well as my fellow Producers Club members who helped me during this journey. You have taught me a lot about running an MSP and keeping it R.E.A.L.!





## Marketing Campaigns and Strategies Implemented

### 1. “Robinized” Website

We decided to give our website a makeover; we signed up with Pronto in February 2015. We launched our new web site to what we thought were Robin’s specs, but the leads still weren’t coming in. After we requested a one-on-one consultation with Robin, she changed things around, explained the numbers and how to properly track conversions, and got us on the right track to focus on the most important numbers. Surprise, surprise...our web site is rocking now. And thanks to Robin’s advice, we are now recording all of our phone calls and tracking against the source of the call so we ensure we answer the phones properly and don’t lose a single lead that comes our way.

### 2. Monthly Newsletter

Technology Times has been a great marketing strategy for Tech Advisors; not necessarily in creating leads, but in converting leads into clients. That consistent, monthly contact keeps our name fresh in the minds of our prospects. The monthly newsletter has also been a great marketing tool in regards to selling additional services to our existing clients. Current clients make up about 50% of the companies who receive our newsletter.

### 3. Tech-Tip Post Card

The results of this marketing strategy were very similar to that of the newsletter, given that the frequency, list, and purpose follow the same formula. For a while we were only printing the post-cards and emailing the newsletter; but we now print and mail both of these monthly campaigns.

### 4. LinkedIn Campaign

This campaign served primarily as a tool for generating our various marketing lists. A message was sent to CEOs and multiple business professionals in the Boston area introducing Tech Advisors and our service offering. Based on their response, that individual was either added to the newsletter/ postcard mailing list or added to the list and given a phone call directly.

### 5. Google AdWords

Google AdWords was by far, one of the strongest marketing strategies we implemented in 2015. It generated an incredible amount of traffic to our website; got our phones to ring; and helped give Tech Advisors credibility. About 85% of our inquiries this past year mentioned learning of Tech Advisors/finding us on Google. Google AdWords was also our most expensive marketing tool in 2015, but certainly worth it.

### 6. Valentine’s Day Client Appreciation

In the midst of tax-season madness, we treated many of our CPA firm clients to one of three different snack baskets filled with office treats to help get them through the long days. Our top three CPA clients received a catered lunch at their offices. Of the 30 or companies who were recipients; about 6 of them referred us to colleagues throughout the year.

### 7. 10<sup>th</sup> Anniversary Party

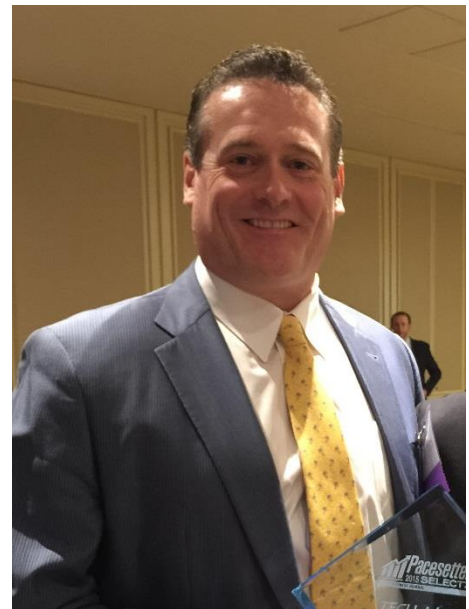
Our 10 Year Anniversary couldn’t have come at a more perfect time. Again, we used Robin as a valuable resource in planning this party, and scheduled a one-on-one call with her to help us make a big deal out of the event. Thanks to Robin’s input, we put on a successful event and went to work making sure that all of the local business publications were invited and in attendance along with our clients. To date, we’ve been featured in seven or eight local business publications; our clients have been complimenting us over and over about all of the free publicity that they’ve gotten from being at our event. We also set up a video booth at the party and got some wonderful, genuine client testimonials that will be an invaluable marketing tool as we continue to grow.

We have learned so much from being members of the RR Producers Club. We had never done any marketing before; and through this process, we learned how to implement solid marketing campaigns **and** how to track them. By tracking the campaigns it became very clear which campaigns were working, and when we needed to reach out to Robin for help. Thank you again Robin!

We are thrilled with the campaigns we have implemented in 2015 and are committed to implementing an additional campaign per quarter in 2016. These campaigns are: The Godfather Campaign, The Bad Date Campaign, The Computer Hammer Letter, and the Halloween Eyeball Campaign. We also will be using Shock n' Awe going forward with all prospects.

With the help of TMT and Robin Robins, we are hoping to add an additional \$100,000 a month of MRR, and grow Tech Advisors, Inc. to a 5 million dollar MSP by 2017. Stay tuned...

Konrad Martin  
President/ CEO  
Tech Advisors, Inc.  
266 Main Street, Suite 15  
Medfield MA, 02052



# 2016 “Better Your Best” Contest Essay



## Martin Joseph 360 IT Partners

Revenues Up \$1,147,703  
Monthly Recurring Revenue Up \$85,426/month  
Net Profits Up 169%

*“Last year alone, our marketing generated 156 appointments and 82 new sales (53%). And by Q4, our close ratio is now up to 77%, thanks to a lot of hard work combined with Robin’s Slippery Slope sales process!”*

The following was originally submitted by Martin via video. You may access the video online at <https://vimeo.com/153615386> (password: letmein116)

Kirsten: Martin, will you outline where you were in early 2015? Tell us about your sales and marketing. What did it consist of? What frustrations were you facing? What marketing attempts did you make up until then?

Martin: We began 2015 coming off of a great year, 18% growth in top-line revenue with \$2.8 in sales. Sales were strong and we continued to grow last year. Our marketing plan was to continue our Robinized website, which has worked great for us as well as our e-newsletter. We also wanted to keep our relationship with our PR firm who had been doing a great job for us, which was Robin's suggestion a few years back to get a good PR firm. I also became more involved with the community and obtained strategic board appointments that really helped me increase my profile in the community. I also did some networking with my Entrepreneur's Organization as well. Following Robin's other suggestion to hire people, the right people for the job, I wanted a superstar salesperson for my company. I wanted somebody who had potential to be a great closer. I hired that person in December of 2014. The first part of 2015 I spent cultivating him. He personally closed \$26,576 in new MRR for the entire year. It was awesome. Some of my frustration was while I was out of the office I was able to work on my business, but while I was in the office I was working in my business. I wanted to break myself of those chains. Even though I hired a new salesperson who was working out great, I was still frustrated. Trying to find experience and technical talent was really difficult in our market. They had all been taken up. So, in March of 2015, I merged my company with a smaller, local MSP with annual revenues of \$900,000 and 7 technical employees. That really helped solve my technical problem right away. It was a win-win for both companies, and we significantly grew gross revenue and profits. We spent the remainder of 2015 integrating our businesses, our clients and our cultures together, ultimately getting everyone under the same roof. It's been transformational. In my frustrations with the time I was spending on day to day operations I decided to again take Robin's advice and bring on a full-time marketing manager. In June of 2015 I hired the right person. Her sole responsibility is to execute Robin Robin's marketing campaigns and strategies.

Kirsten: Martin, can you please outline what you've implemented from the Producers Club and what the results were?

Martin: We implemented a cross-sell voiceover IP campaign. We added 5 new clients and about \$800 in new MRR. We also did a cross-sell campaign with BDR. We had some interest but didn't

convert any clients. We also made one critical error, and I'll share that with you in the next question. We did the JV partner lunch and learn for Cybersecurity and partnered with 2 local banks. We received 5 leads and added 2 accounts totaling \$3,500 in new MRR. Our Robinized website is by far our best lead referral source. Typically, we get about 12 to 20 new leads a month just from our website. The Done-For-You newsletter is amazing. We get great feedback from our clients, and we picked up one new client in April of last year that totaled 2,500 in new MRR. Then finally our Shock and Awe email. This really sets us apart from our competition. When we send this out to our prospects they're really impressed with the level of professionalism. We also did the Section 179 campaign that proved to be very valuable. We added \$150,000 in new revenue in the month of December. Then we followed it up with a 9-word email campaign about the Section 179. It was overwhelming the number of people that replied directly to my email request. It turned out really well, and many of them even asked for us to send them a digital copy because they didn't receive the printed one.

Kirsten: Martin, what did you learn in 2015 and what mistakes did you make? How do you feel you turned your failures into wins?

Martin: We made a huge mistake in a cross-sell BDR campaign that we did. We accidentally sent the campaign to our existing BDR client base that were already using our BDR. This caused a major back pedaling for our entire staff. We were having to field a lot of calls and a lot of emails. We were proactive and reached back out to our clients again and just assured them that their backups were working fine. It also allowed us to have another touch with our client. We turned it around and made it a healthy conversation and gave a lot of assurances, so we turned it into a win. On a greater scale, we learned that we needed consistency and solid follow up. By having a marketing manager and a new salesperson we can now focus on getting leads and closing deals. This has also freed me to solely work on my business, not in my business. I couldn't be happier about that.

Kirsten: Martin, what has been the biggest personal benefit to you?

Martin: The biggest benefit for me as being part of the Producers Club is having an IT sounding board and new creative marketing sales ideas. All the Done-For-You marketing programs allow me 110% confidence that my marketing program will deliver results, which in turn allows me to focus on growing my business. In addition, I always leave the Producers Club meetings completely pumped and ready to take my business to the next level. Having opportunities such as being in the "Hot Seat" with Robert Herjavec and having a great discussion with him on stage was just absolutely awesome. None of my other business owner buddies have access to these kinds of opportunities that Robin and her team deliver. It's amazing.

Kirsten: Martin, what are your expectations for your business and for you personally in one, 5 and 10 years from now?

Martin: My number one goal is to continue to grow the stock value of my company by growing a solid client base with a talented and dedicated staff. I've always thought this way, but it was reiterated to me when I was on stage with Robert Herjavec. He pretty much said the same thing. How could I increase the stock value of my company? We just completed 2015 and did almost \$4 million in top- line revenue. This year I expect to grow to \$5 million by implementing more of Robin's marketing campaigns. We've already built out our 12-month marketing calendar, and we're ready to roll. Going year over year I'd also like to acquire 2 more companies over the next 5 years and grow our business to \$10 million in 5 years. By year 10 I want to consider a less active role in the company, perhaps even maybe being bought out by my business partners and maybe even retiring.

**Monthly Newsletter:** We consistently mailed a printed TechTimes monthly to about 250 clients and prospects. Each newsletter features a client spotlight on the front page with a brief summarization of the company and their logo. The newsletter led to a new client that added \$3016 in new MRR. We get great feedback from our clients on articles and content.

**Robinized Website:** This is by far our best lead referral. Typically, we get 12 to 20 new leads a month from our website. These leads are then qualified with about 25% becoming qualified prospects. Of these prospects, we close about 1-3 deals from website leads each month. The website is continually being updated with employee photos, testimonials and client photos, and campaign specific landing pages.

**Section 179:** We sent this campaign using direct mail in mid-November 2015. This was sent to a list of 400 contacts including prospects, clients. Thanks to this campaign, we were able to book an additional \$150,000 in project sales before the end of the year!

**9 Word email:** We used this as a follow up to the Section 179 campaign and had overwhelming responses. Many clients never saw the (direct mail) Section 179 letter and requested a digital copy. This opened the door to multiple conversations regarding project work in December 2015 and possible projects for 2016.

**Robin's Slippery Slope Sales Process:** We implement this as our sales process. The specific components of this sales process that we find most successful are the Shock & Awe video, using an alias email to set appointments and send reminders, providing network audits/Technology Tune Up's for prospects, and the closing process technique. For the last quarter and the beginning of January, our percentage of won vs. loss was 77%. This percentage includes any project work for current clients or proposals to new prospects. Last year, we went on 156 total appointments with prospects or to propose new services to existing clients. Of those 156, 82 were converted to a sale, for a close ratio of 53%.

#### **Other Campaigns Used:**

- Shock & Awe video
- Hassle-Free Book
- Bad Date Letter
- JV Partner Lunch and Learn/Cybersecurity talk
- E-newsletter
- Valentine's Day Referral Campaign