

Marketing for Agencies — Workbook

This workbook turns the Marketing for Agencies course into a working client-acquisition system. You will choose a defensible niche and productize an offer, build an inbound engine with a lead magnet, install a LinkedIn and outreach routine anchored in real case studies, and engineer referrals and partnerships into a repeatable pipeline. Work through one section per module, then use the templates to run and measure your agency growth month after month.

Positioning, Niche, and a Productized Offer

Pick a niche you can win, write sharp positioning, and package one service into a fixed-scope offer.

Exercise: Score and Choose Your Niche

List three to five candidate niches, slicing by vertical, service, or outcome. Rate each from 1 to 5 on budget, pain and urgency, reachability, your credibility, and competition and fit, then shortlist the top one or two. Sanity-check the winner with quick LinkedIn and directory research on market size.

- Which three to five niches are you actually considering, and how is each one sliced?

- Which niche scored highest once you summed the five criteria?

- Where do you already have a result, sample, or connection that makes you credible today?

- Roughly how many reachable companies exist in your top niche, and do they already hire agencies?

Worksheet: Positioning Statement Builder

Fill each field, then assemble them into one sentence of the form: I help WHO get OUTCOME through SERVICE. Refine until a stranger could repeat it back after hearing it once.
WHO (specific niche and decision-maker)

OUTCOME (the result they care about)

SERVICE (how you deliver it)

Primary pain you solve

Why you are credible here (proof point)

One-sentence positioning statement

Where this statement will appear (site, LinkedIn, outreach)

Worksheet: Productized Offer Spec

Define one productized offer with the five required parts and a good-better-best ladder. Leave any price-math or projected-revenue cells blank and fill them in yourself once your numbers are set.

Offer name (outcome-oriented)

What is included (scope list)

What is explicitly NOT included (out-of-scope)

Timeline and key deliverables

The promise or guarantee

Starter tier price

Growth tier price (the intended default)

Scale tier price

Checklist: Positioning and Offer Launch Checklist

- Scored at least three candidate niches and chose one focus
- Validated demand with a quick market-size check
- Wrote a one-sentence positioning statement a stranger can repeat
- Packaged one service into a named, fixed-scope offer
- Added an explicit out-of-scope list to protect margins
- Built a good-better-best ladder with the middle tier as default
- Updated site headline and LinkedIn headline to the new positioning

Inbound: Thought Leadership and Content That Attracts Clients

Build a pillar-and-cluster content plan, ship a lead magnet, and set a cadence you can sustain.

Exercise: Map Your Pillar and Money Topics

Write down the top ten questions your best clients asked before hiring you. Identify two or three bottom-of-funnel money topics (cost guides, how-to-choose, comparisons) and one broad pillar topic, then branch five to eight cluster questions from the pillar.

- What are the top ten pre-hire questions your ideal clients ask?
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- Which two or three topics signal a buyer who is ready to hire?
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- What single pillar topic is broad enough to anchor a cluster but specific to your niche?
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- Which five to eight cluster questions branch from that pillar?
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Worksheet: Lead Magnet Plan

Design one specific lead magnet that solves a slice of the niche problem immediately, and define the capture flow around it. Fill the conversion-rate and opt-in-count cells yourself after the magnet is live.

Lead magnet title and format (checklist, calculator, swipe file, teardown)

Exact problem it solves in one sentence

Tool hosting the form and list (ConvertKit, Mailchimp, HubSpot, etc.)

Form fields requested (keep minimal)

Where it is embedded (articles, profile, page)

Welcome sequence outline (3 to 5 emails)

Landing page conversion rate (fill after launch)

Opt-ins that booked a call (fill after launch)

Checklist: Content Engine Checklist

- Listed top pre-hire questions and chose money topics
- Defined one pillar and five to eight cluster pieces
- Grounded topics in keyword or question research
- Built one specific, niche-relevant lead magnet
- Connected a form, a list, and automated delivery
- Wrote a 3 to 5 email welcome sequence with one soft offer
- Committed to a realistic weekly cadence on the calendar

Outbound: Case Study-Driven Outreach and LinkedIn Authority

Optimize your profile, run case-study-led outreach on a tight list, and document results as reusable proof.

Worksheet: LinkedIn Profile Tune-Up

Rewrite each profile element to act as a landing page that states who you help and the outcome. Draft the copy here, then publish it.

New headline (who you help + outcome)

Banner message or flagship result

About section opening story line

Proof points to include in About

Call to action and link (lead magnet or booking page)

Featured items to pin (case study, magnet, talk)

Weekly posting cadence and rotation of post types

Exercise: Build a 50-Prospect Outreach List

Define your ideal client profile and a visible buying trigger. Build a focused list of about 50 perfectly matched prospects using targeting and enrichment tools, verify the emails, and map each prospect to the single most relevant case study before writing anything.

- What is your ideal client profile (industry, size, contact role)?
 - What external trigger signals they need you right now?
 - Which tools will you use to source, enrich, and verify the list?
 - Which case study or result is most relevant to the bulk of this list?
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Worksheet: Outreach Sequence Copy Builder

Draft a short, proof-led sequence: a personalized observation, relevant proof, a low-friction ask, and an easy out, plus follow-ups that add value. Keep the first message to four to six sentences.

Personalized opening observation (specific and true)

Relevant proof line (comparable client + result)

The low-friction ask (small yes, not a meeting demand)

The easy out (permission to say no)

Follow-up 1 angle (adds value)

Follow-up 2 angle (adds value)

Sending domain and opt-out confirmed (yes/no)

Checklist: Outreach and Authority Checklist

- [] Rewrote LinkedIn headline and About as a landing page
- [] Set a 3 to 5 post weekly cadence with a content rotation
- [] Spent daily time commenting on ideal-client posts
- [] Built a tight, verified list of well-matched prospects
- [] Mapped each prospect to a relevant case study
- [] Wrote a 4 to 6 sentence proof-led first message
- [] Configured the sending domain and included an opt-out

Referrals, Partnerships, and Measuring What Works

Engineer referrals and partnerships into a repeatable engine and track the metrics that predict revenue.

Exercise: Script Your Referral Ask

Define what a great referral looks like, list the natural high points in your delivery where asking feels earned, and write one short, specific ask you can reuse after each win. Practice making introductions effortless by drafting a forwardable blurb.

- In one sentence, what does an ideal referral look like for you?

- Which moments in delivery are your natural peak-satisfaction points?

- What is your specific, reusable referral ask, word for word?

- What forwardable blurb could a client paste to introduce you?

Worksheet: Partnership Target List

Identify complementary, non-competing providers who share your audience and a generous first move for each. Fill the referrals-exchanged counts yourself as the relationships develop.

Partner name and specialty

How they overlap with your audience

Why they do not compete with you

Your generous first move (referral, promotion, co-creation)

What you can reliably refer to them

Referrals sent to them (fill over time)

Referrals received from them (fill over time)

Worksheet: Pipeline Metrics Setup

Decide what you will track in your CRM so you can compare channels and forecast. Leave every rate, average, and weighted-value cell blank and compute them yourself from your own data.

CRM or tool you will use

Stages you will track (lead, call, proposal, won)

Lead-to-call conversion rate (compute from data)

Proposal-to-client conversion rate (compute from data)

Average deal size (compute from data)

Best-performing channel so far

Weighted pipeline value (compute from data)

Checklist: Referrals and Measurement Checklist

- Defined what a great referral looks like
- Identified peak-satisfaction moments to ask
- Wrote and used a specific, reusable referral ask
- Made introductions effortless with a forwardable blurb
- Built relationships with at least two complementary partners
- Led each partnership with a generous first move
- Tracked lead source and stage for every opportunity in a CRM
- Reviewed conversion by channel and set a simple forecast

Your Action Plan

1. Score candidate niches and commit to one defensible focus
2. Write a one-sentence positioning statement and update your site and LinkedIn
3. Package one service into a named, fixed-scope, good-better-best offer
4. Map a pillar topic with five to eight clusters and publish the first piece
5. Build one specific lead magnet and connect a form, list, and welcome sequence
6. Rewrite your LinkedIn profile and start a 3 to 5 post weekly cadence
7. Build a tight 50-prospect list and run a proof-led outreach sequence
8. Document at least three results as challenge-solution-results case studies
9. Script a specific referral ask and build two complementary partnerships
10. Track every lead by source and stage in a CRM and review conversion monthly

