AIM-GET

FRAMEWORK FOR
AGENCY SUCCESS

WORKBOOK

Identity

Second Edition

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GROWTH ALLIANCE

www.smallagencygrowth.com

Introduction

The AIM-GET Framework for Agency Success provides a roadmap that public relations and marketing agency owners can use to build a business that gives them personal and financial satisfaction.

This Planning Guide provides a step-by-step process for identifying your goals as an agency owner by examining where you are today – and where you want to be in the future.

How to Use this Guide

This workbook can be used on your own or in partnership with a consultant to evaluate what you really want to achieve with your agency business. It has been structured to walk you through the process, including asking questions to get you to think more deeply about where your business has been – and where you want it to go.

Feel free to print out this workbook and write your answers directly on paper or use any other format that you find most helpful to the way you work.

Information Gathering

Start by answering the questions and identifying the goals you have for yourself and the agency. This will provide the foundation you need for the next steps.

Be thoughtful about your answers and take your time to gather the information you need to complete them thoroughly. The process you go through here will add considerable value to your planning process.

Action Plan

Once you have completed the questions and goals, set this workbook aside for at least a day or two. That will give you time and space to think about what you have assembled.

Now it's time to dig in to the Action Plan, which is set up in a timeline fashion so that you can prioritize effectively. It can be very helpful to find a trusted advisor or impartial third party to

help you think through your answers and how best to operationalize the goals you have set out.

Focus your Action Plan on practical steps you can take to further your Identity. You should emphasize your own personal actions since there will be opportunities as you implement the rest of the AIM-GET Framework to look at how others in your business will make a difference.

Accountability

The final step is to identify specific, actionable, measurable goals that you will use to ensure you stay on track.

You should check back on your goals and Action Plan quarterly to keep it updated and use it as a tool to help you keep your focus.

Take Stock of Existing Clients

Who are your 3 most profitable clients now?

1.

2.

3.

Who are your 3 least profitable clients now?

1.

2.

3.

Who are your 3 favorite clients now?

1.

2.

3.

Who are your 3 least favorite clients now?

1.

2.

3.

What 3 things would you most like to change about your current client roster?

1.

2.

3.

Take Stock of Existing Services

Who are your 3 most profitable services now?

1.

2.

3.

Who are your 3 least profitable services now?

1.

2.

3.

Who are your 3 favorite services to provide?

1.

2.

3.

Who are your 3 least favorite services to provide?

1.

2.

3.

What 3 things would you most like to change about your current mix of services?

1.

2.

3.

Think About Identity Like a Journalist

WHO do you serve?

Organization type(s):

Organization size (employees and/or revenue):

Organization stage (startup, established, etc.):

Other characteristics of the organization:

Primary contact title(s):

Primary contact tenure with organization:

Other characteristics of the primary contact:

WHAT services are you offering?

Mandatory service(s):

Optional service(s):

WHERE are your clients?

Client time zone(s):

Client countries:

Client states:

Client cities:

Other client geographic requirements:

WHEN do you provide services?

What business events or needs drive clients to hire you?

Do you provide ongoing or project-based services?

Ongoing/retainer service(s) provided:

[ ]

One-time/project service(s) provided:

[ ]

HOW does your process work?

Do you have productized service offerings? If so, what are they?

[ ]

Do you have clear, branded methodologies you use? If so, what are they?

[ ]

Is there a path of services for clients to follow as they grow with you? If so, what are they?

Describe your approach to working with clients and their teams.

WHY do clients hire you?

Are you a pain killer or a vitamin for clients? Explain.

Are you premium-priced or a budget option? Explain.

What business objectives do you help clients meet?

How would you like clients to answer why they work with you?

Why do clients say they choose to work with you?

How would you like clients to answer why they work with you?

Create Your One-Sentence Description

This sentence is designed to be your answer when someone asks what your agency does.

I/we help _____ [target client description]

to _____ [business goal]

by _____ [the value you add]

EXAMPLE: I help PR agencies with less than 50 employees to achieve double-digit growth by providing practical business advice and ongoing coaching.

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Describe Your Ideal Referral

This is the sentence you use when someone asks how they can help you.

I'm looking for _____ [ideal client type]

with _____ [size by revenue or employees]

who _____ [challenge they are facing]

and _____ [other important characteristics]

EXAMPLE: I'm looking for owner-led PR agencies with less than 50 employees who want to make changes to their businesses to achieve double-digit growth and are located in the U.S.

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Identify Your Red Flags and Show Stoppers

What is your minimum client budget?

What is the minimum client engagement length?

What services will you definitely NOT provide that you are sometimes asked to?

What types of clients will you definitely NOT work with?

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Action Plan

To ensure that my agency is aligned with the identity I have identified in this worksheet, I will take the following steps.

Immediate Steps (less than 90 days)

Short-Term Steps (3 to 6 months)

Intermediate Steps (6 to 24 months)

Long-Term Steps (more than 24 months)

Accountability

My top three goals for the next 12 months are:

1.

2.

3.

I will measure my success at achieving these goals in 12 months with the following metrics:

1.

2.

3.

Notes

About the AIM-GET Framework

The AIM-GET Framework for Agency Success was developed by Chip Griffin to help agency owners make key business decisions needed to generate meaningful results.

It establishes a planning and implementation process that ties personal and business objectives together.

The six pillars of the Framework are:

- Ambition
- Identity
- Management
- Growth
- Execution
- Talent

The first three pillars (AIM) act as a compass, pointing the agency in the right direction by establishing the vision and taking a 30,000-foot view of the business.

The second set of pillars (GET) transitions into the day-to-day work it takes to build a sustainable agency that continues to deliver results.

More information can be found at https://www.agencyleadership.com/aim-get

About SAGA

The Small Agency Growth Alliance works with public relations and marketing agency owners to build better businesses. Through hands-on consulting, training, and advice, Chip Griffin uses his decades of experience to help agency owners achieve their goals.

To learn more about SAGA and how it serves the agency community, please visit www.smallagencygrowth.com.