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INTRODUCTION

Congrats! You've bought access to these 66 (and growing) tools, templates, SOPs and other agency resources. They'll help you increase your profit margins… and save you 50-200 hours of work. To help you find things faster, I've sorted the Toolkit by topic.

Because the templates aren't one-size-fits-all, be sure to get feedback from an appropriate professional (lawyer, accountant, therapist, etc.) before applying the template in your agency.

The resources here are for your internal use. You can't sell or otherwise repurpose them (on a paid or unpaid basis) to entities outside your agency. But if you'd like to discuss licensing them for broader use, please get in touch.

I'll continue adding more templates over time. Got questions or suggestions for future templates? Contact me here! –Karl

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BUSINESS STRATEGY

How can you prepare for a profitable, sustainable, low-stress future? Use these templates to get there faster.

- **Advance Retrospective**
  - **Visualize your ideal future, so you can identify how to get there**
  - ~~Template (Google Doc)~~
  - ~~Article on creating Advance Retrospectives~~
- **Streamlined Goal-Setting**
  - **Identify your top priorities, and set immediate goals), from Karl's in-person workshops**
  - ~~Template (Google Doc);~~ works best with Karl's guidance
- **Test the Viability of a New Market**
  - **Estimate your revenue based on the market size**
  - ~~Template (Google Sheets)~~
  - ~~Article on how to choose a client industry vertical~~
- **Compare Options for Client-Industry Verticals**
  - **Compare based on qualitative factors**
  - ~~Template (Google Sheets)~~

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- **Valuation Estimator—Estimate Your Exit Price (and Sales and Headcount Milestones)**
  - **Valuation model is based on a multiple of EBITDA**
  - ~~Template (Google Sheets);~~ after you make your own copy, you'll need to make significant modifications to reflect your starting revenue, conversion stats, etc.
- **Readiness Rater**
  - **Evaluate how agency's readiness for a potential change, before committing resources to the shift.**
  - This might be a medium, large, or enormous change. For example, it might be one of these:
    1. "Switch from milestone to value-based pricing"
    2. "Add AI as a service"
    3. "Grow revenue 100% next year while maintaining 20% margins"
    4. "Launch a SaaS product"
  - Be sure to evaluate each potential change separately, since your agency's current readiness will vary for each situation.
  - ~~Readiness Rater template (Google Doc)~~
- **Create Your Annual Revenue Plan**
  - **Convert your annual revenue target into a revenue *plan*.**
  - This is only the first of several steps—get your accountant's help, too!
  - ~~Revenue Plan Template (Google Sheets)~~
- **Calculate What You'll Make in the Next Decade**
  - **Depending on your current compensation and future growth potential, your agency just might make you a [multi]millionaire… *without* ever selling the business.**
  - This financial model helps you calculate roughly what you might make in salary over the coming decade, based on certain assumptions about the raises you might give yourself each year.

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- This spreadsheet is intended to be a super-simple model (e.g., it doesn't include inevitable tax and inflation impacts; you'll get additional income from profits; and your growth in personal assets depends on how much you *save* from your salary).
- ~~Simple Salary Income Calculator (Google Sheets)~~

- **The Decisionmaker's Friend**
  - **Need to make a big decision? Weigh the pros and cons as they impact key stakeholders!**
  - ~~Pros & Cons vs. Key Stakeholders (Google Sheets)~~
- **Companion Workbook: "Work Less, Earn More"**
  - **Want help organizing your "Work Less, Earn More" journey? Get the free 40+ page workbook from my 2023 book. It includes exercises from my "Work Less, Earn More" agency growth bootcamp… yours free of charge, via the Toolkit.**
  - ~~Companion Workbook: "Work Less, Earn More" book~~ (Google Doc)
- **Team Structure: Mega-Reference Spreadsheet**
  - **Trying to find the right Team Structure for your agency? This spreadsheet has 25+ columns, exploring details about the five major options.** This includes things like whether the model helps you become Optional, how to impacts employee retention, and typical headcount ranges.
  - ~~Agency Team Structure: How to Think About Your Org Chart~~ (Google Sheets)

TIME MANAGEMENT & SELF-CARE

Prioritizing better will make your life easier. So will taking time to "put on your own oxygen mask first, before assisting others"—aka self-care.

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- **Time Bucket Template**
  - Shortcut to finding things you can cut from your schedule
  - ~~Template (Google Sheets)~~
- **TOP5 Daily Checklist**
  - Printed sheet to prioritize what to do each day
  - ~~Print-ready Template (Google Docs)~~
- **Worksheet for "Get It Done" accountability training**
  - Following the in-person workshop with Karl
  - ~~Print-ready Template (Google Docs)~~
- **"Pre-Mortem" Worksheet**
  - Evaluate what might go wrong, before it happens… so you can prevent the problem before it starts
  - ~~Template (Google Doc)~~
- **Debrief (aka "Post-Mortem") Worksheet**
  - Learn from what did and didn't work, so you can improve next time. I do debriefs after every client engagement, most sales calls, and major internal projects.
  - ~~Template (Google Doc)~~
- **Sample 90-day (3-month) plan with S.M.A.R.T. goals**
  - See how you might "chunk" goals into SMART goals.
  - ~~Sample template (Google Doc), focusing on a Lifestyle agency example (but you can use the tool for High-Growth agencies, too)~~

MANAGING TEAMS

Without a team, you wouldn't have an agency. These templates will help you get better results from your team.

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- **Team / Employee Census**
  - **Track key info about employees (and core contractors) in one spreadsheet**
  - ~~Template (via Google Sheets)~~
- **Performance Improvement Plan (PIP) template**
  - **Create a constructive plan to help struggling employees… and remind them this is their last chance**
  - ~~Template (Google Doc)~~
- **Layoff Guide**
  - **Best practices and actionable advice for terminating employees, including how to prepare, day-of, and after termination**
  - ~~Agency guide (Google Doc)~~; most of it applies to firing situations, too
- ***Made to Lead: A Pocket Guide to Managing Marketing & Creative Teams***
  - **My 2016 guide to leading agency teams; a 20-30 minute read**
  - As a client, get a FREE copy—~~download the Kindle .mobi file here~~ (and then here's how to get it onto your Kindle)
  - OR: Paperback (via Amazon) for US$4.95
  - OR: Kindle (via Amazon) for US$3.95, if you're sharing with a non-client
- **Don't Reinvent the Wheel: Perfecting P.M. at Your Agency**
  - **Project management basics for agency owners, non-PMs, and new PMs**
  - Training video (via Gumroad) ← Use discount code ***** to get this for free (a US$100.00 value)
- **COO Job Description Template**
  - **Need to write a job description for your future #2? Use my Agency COO Job Description template to jumpstart the process!**
  - ~~Job description template (Google Doc)~~

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- **Team Preferences Survey**
  - **Get to know your employees' favorites, to choose incentives wisely**
  - ~~Sample Survey (you'll need to build your own version!)~~
- **Email to your best former boss**
  - **Say thank you to your best boss, now that you fully appreciate their efforts. Sending it will make them feel good… and it'll make you feel good, too. It also helps you build self-awareness about being a good manager.**
  - ~~Email template in a private blog post~~

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MANAGING CLIENTS

Clients—can't live with 'em, can't live without 'em. These templates will help you improve client relationships… including deciding which ones to fire when the time comes.

- **eBook: *Don't Just Make the Logo Bigger***
  - **Tired of difficult clients? Here's a roundup on why and how to make the shift, with 20 pages of advice.**
  - ~~20-page eBook (PDF)~~
- **eBook: *Client Onboarding for Agencies***
  - **Learn how to create an agency process that fosters growth and profitability, with 20 pages of advice.**
  - ~~20-page eBook (PDF)~~
- **Start Strong: Create a Profitable Client Onboarding Process at Your Agency**
  - **Ready to start client relationships on the *right* foot? This training shares strategies and tactics to help you start strong—including 8 reasons why you struggle, 7 warning signs, 3 ways to think strategically about onboarding, what to automate and what to exclude, and Q&A from fellow agency leaders.**
  - Training video + slides (65-minute video + 27 slides, via Gumroad) // Use discount code ***** to get this for free (a US$100 value)
- **Workbook: Client Onboarding**
  - **Get step-by-step guidance on creating your client onboarding process, going beyond the eBook above. Originally created for Mod Agency Insiders event.**
  - ~~Client Onboarding workbook (Google Doc)~~

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- **Scripts for Difficult Client Conversations**
  - **27 pre-written scripts (approximately a paragraph apiece, for you to customize), focusing on scope management and client satisfaction**
  - ~~Scripts (via Google Docs)~~
- **Client Signoff Template**
  - **Got a big milestone and concerned they'll change their mind later (and expect free fixes)? Get a formal written signoff. Something like EchoSign is fine, but people tend to think harder before they sign a physical doc.**
  - ~~Template (via Google Docs)~~
- **Client Rating Matrix**
  - **Decide which clients to grow… and which to fire**
  - ~~Worksheet (via Google Sheets)~~
- **Client Happiness Audit**
  - **Find problems early, to fix *before* they explode**
  - ~~Worksheet (via Google Doc)~~
- **Pre-Kickoff Survey**
  - **Know what you're getting into! Here's ~~my article on the topic~~.**
  - ~~Sample of my pre-kickoff survey for consulting projects~~
- **Client Intake Questionnaire**
  - **Gather client info early in your project to avoid problems down the road and clear up any questions**
  - ~~Sample of Karl's survey questions, to use as a starting point for yours~~
- **Kickoff Meeting Agenda**
  - **Use this as a template for creating your agency's client Kickoff Meeting agenda (whether in-person, via video, or by phone)**
  - ~~Template of Karl's kickoff agenda, to use a starting point for yours~~

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- **Task Matcher: Pre-selecting Primary & Backup People**
  - **Pre-identify which team member(s) can do which work, to reduce confusion during PM and to help you identify upcoming staffing gaps.**
  - This tool works best when the agency is drawing from a single pool of people (rather than separate "pods") but it can work in other ways as you grow.
  - Article: Assign work to the Cheapest Competence [Available] Person (CCAP)
  - ~~Template for matching tasks & team members (Google Sheets)~~
- **Travel Calculator for Client Visits**
  - **Calculate what to charge based on travel expenses and labor costs.**
  - ~~Template for calculating travel charges (including labor & expenses) for client visits~~
- **Agenda for Client On-Site Visit**
  - **Plan your onsite; clarify who needs to where/when; and reduce the risk of confusion and other misunderstandings about goals, prep, and outcomes.**
  - ~~Template of agenda (Google Sheets) to share with client leadership team~~
- **Work Breakout (WBO) Calculator to Measure Profitability**
  - **Calculate profitability on a per-project (or per-retainer) basis, to help you measure what is and isn't working, and to boost overall profitability.**
  - Introductory article on the Work Breakout concept (blog post)
  - ~~Private tutorial on how to use the WBO spreadsheet (Google Doc)~~
  - ~~WBO calculator spreadsheet, with and without Direct Labor Costs (Google Sheet)~~
- **Client Off-Boarding (Exit) Advice**
  - **Here's what to do when a client's leaving (whether they fired you or you fired them). The smoother it goes, the more likely you'll get future business (either from the client company, or from your contact when they go elsewhere).**
  - ~~Step-by-step tutorial for Client Off-Boarding (Google Doc)~~
- **Get Paid Faster: How to Handle (and Prevent) Past-Due Clients**
  - **Tired of clients that are currently (or chronically) past-due? Help is on the way! This training walks through my 6-step "Active Escalation" process (which you**

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can customize to your agency), and shares 15 tips to help you reduce (or event prevent) the problem in the future.
- Training video + slides (62-minute video + 27 slides, via Gumroad) // Use discount code ***** to get this for free (a US$100 value)

- **Paid in Full: How to Stop Scope Creep at Your Agency**
  - **Got clients who feel entitled to free work from your agency? You've got scope creep—and the problem is hurting your profit margins and frustrating your team. Fortunately, you can turn this all-too-common agency problem into a profitable opportunity! This training includes strategic and tactical tips, to help you start getting results immediately.**
  - ~~Training video (58-minute video, via YouTube unlisted) + 27 slides (PDF)~~

SELF-MARKETING

Poor self-marketing saves you time now… yet you'll have a dry sales pipeline sooner than you expect. These resources will help you get your act together.

- **Upgrade Your Pipeline: Content Marketing for Agency Lead-Gen**
  - **Every agency knows they "should" be doing content marketing to generate leads for themselves… but many agencies struggle to make it work.**
  - In this training, you'll learn how to generate high-quality leads for your agency, based on the content lead-gen techniques I use myself. (In fact, content marketing is probably what got you here today!)
  - Training video + slides (64-minute video + 27 slides, via Gumroad) // Use discount code ***** to get this for free (a US$100 value)

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- ***How 12 Big-Name Clients Chose Their Agencies***
  - Learn how your dream clients select their agencies, so you can adjust your marketing
  - ~~eBook (downloadable PDF)~~
- **How to Sell Digital Marketing Services**
  - **Learn about key ideas for selling digital services such as design, development, and online marketing**
  - Training video (via Gumroad) ← Use discount code ***** to get this for free (a US$50.00 value)

SPEAKING FOR LEAD-GEN

This fits under self-marketing, but I have lots of resources for clients who want to use public speaking for lead-gen. So, here's its own section!

- ***The In-Demand Marketing Agency: How to Use Public Speaking to Become an Agency of Choice***
  - **My 2015 guide to public speaking as agency lead-gen; a 2-hour read**
  - As a client, get a FREE copy—~~download the Kindle .mobi file here~~ (and then here's how to get it onto your Kindle)
  - OR: Paperback (via Amazon) for US$11.00
  - OR: Kindle (via Amazon) for US$4.99, if you're sharing with a non-client
- **Speaker Agreement**
  - **Cover your bases with this contract that I use for every speaking gig**
  - ~~Template (via Google Docs)~~

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- **Karl's Speaker Kit**
  - Take a look at what I have in my speaker kit, as a guide to what you may want in yours
  - ~~Get the 2-page PDF~~
- **Marketing support package**
  - See what information your event organizers will need in order to market you well during your talk
  - ~~Template (via Google Docs)~~
- **Event-prep checklist for speaking**
  - What you need to prepare before you do a talk… you don't want to get to the venue and realize you forgot a key item
  - ~~Speaking checklist~~
- **Create your speaking plan: Cut-and-paste this list to get started**
  - Actionable steps to build your speaking strategy
  - ~~Speaking plan strategy~~
- **Speaker Promotion Resources**
  - See how I organize all the information that an event organizer would need to prepare for my talk
  - ~~Speaker kit (once they're already "closed")~~
- **Favorite speaking tools & resources**
  - Supercharge your talks with the right equipment, software, and service providers
  - ~~Speaking tools and resources~~
- **Audience lead-gen survey template**
  - Get feedback… and leads
  - ~~Template (via Google Docs)~~

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- **Talk Development Template**
  - **Organize the positioning and marketing for your entire talk… and use that to jumpstart the planning process. I use this for planning all of my in-person and virtual events.**
  - ~~Template (via Google Docs)~~

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SALES/BIZDEV

Stop reinventing the wheel every time you speak with a new sales prospect! These resources will help you build a sales process to make the most of your bizdev efforts—so you can celebrate more wins.

- **Workbook: Create a "Fast Fail" Sales Process at Your Agency**
  - **Stop wasting time on poor-fit leads, so you can close better deals!**
  - References: Blog post on the topic, plus my INBOUND 2018 slides
  - ~~Workbook template (via Google Docs)~~
- **Agency Sales Optimization: Best Practices in 3 Stages**
  - **Don't reinvent the wheel; compare your agency to my best practices, and then customize from there!**
  - ~~Best Practices for Sales Optimization (via Google Docs)~~
- **"Manual Welcome" Email Template (to send to newsletter signups)**
  - **When someone signs up for your email newsletter or other content offer, send them a "manual welcome" email to help them as a potential prospect.**
  - Don't have an email list? You're missing out on an important marketing opportunity—more on that via my Inbound Branding article!
  - ~~Email template & "manual welcome" tutorial (via Google Docs)~~
- **Sales Pre-Qualification Survey (Pre-Intake Questionnaire)**
  - **What questions do you want prospects to answer before the call? Here's ~~my article on the topic~~.**
  - ~~Survey (via SurveyMonkey)~~
- **Sales Proposal Template (One-Page, with Three Options)**
  - **Here's the template I use for consulting project proposals!**

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  - At one page, I can create it fairly quickly (once I have the inputs), and it's easy for clients to review and understand. (It serves as a "prop" in my Q&A call at the final stage of the sales process.)
  - NOTE: I don't do formal proposals for coaching, because that's more of a productized service; I find people either decide "yes" or "no" during the exploratory call (or they make a "yes" decision a few days later). I usually share my "What to Expect" doc, which elaborates further—but it's not a custom doc.
  - ~~Sales Proposal Template for Projects~~ (via Google Docs)
- **How to avoid bad sales prospects at your agency**
  - **Bad prospects waste your time and resources, here's how to avoid them**
  - Training video (via Gumroad) ← Use discount code ***** to get this for free (a US$50.00 value)
- **How to keep clients happy during the sale… to get more business later**
  - **Get rid of preventable headaches by keeping clients happy**
  - Training video (via Gumroad) ← Use discount code ***** to get this for free (a US$50.00 value)
- **Define Your Ideal Sales Lead**
  - **Know who you want to sell to so you and your team can identify them—and who they aren't—more quickly**
  - ~~Worksheet (via Google Docs)~~
- **Convert More of Your Proposal-Ready Sales Leads**
  - **Understand your prospects' motivations to help you close faster and sell more**
  - ~~Worksheet (via Google Docs)~~
- **Sales Management Meetings: Sample Agenda & Tips**
  - **Sales management helps you grow revenue more consistently. It also helps you avoid terminating salespeople too early or too late.** This doc includes tips for creating better sales meetings—including a sample template you can customize.

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  - ~~Tutorial + Template (via Google Docs)~~

BONUS: VIDEOS & CARTOONS TO MAKE YOU LAUGH

These will make you laugh and cry… or cry and then laugh.

- **The Vendor-Client relationship – in real world situations**
  - **What it would look like if people treated retail stores like agencies**
  - ~~Video (Scofield Editorial, via YouTube)~~
- **How a Web Design Goes to Hell**
  - **You'll laugh, you'll cry**
  - ~~Comic (from The Oatmeal)~~
- **Say No to Spec**
  - **Video about demanding spec work from retailers**
  - ~~Video (Zulu Alpha Kilo, via YouTube)~~
- **Should I Work for Free?**
  - **Flowchart by designer/illustrator/typographer Jessica Hische about… just that**
  - ~~NSFW Flowchart~~
  - The ~~SFW Flowchart~~
- **F**k You, Pay Me**
  - **Classic video by agency owner Mike Monteiro & agency attorney Gabe Levine**
  - ~~Video (via CreativeMornings San Francisco)~~
- **UNION (Toronto) Employee Thank-You Video**
  - **Imagine your staff is working long hours. Here's an "option" to reward them.**
  - ~~Video (via UNION's 2014 Agency of the Year recognition)~~

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REQUEST NEW RESOURCES

Creating bespoke (custom) templates for a client is generally a billable activity. But sometimes I'll create templates at no charge, if the template is likely to benefit other clients.

Feel free to make a request—email me at karl@sakasandcompany.com.