




PRESENTED  
BY BLOOM

Who Wants  
More CLARITY?





# Who Wants More **CONTROL?**





# Who Wants More **FREEDOM?**



**Who Wants an Agency  
ASSET That They Can Sell  
One Day?**

**Welcome to  
Agency  
Freedom Live!**





**Thank You!!**





# Over the next 3 days...

- Strategic Plan for 2025
- Generate More Revenue
- Reduce Expenses with AI
- Build and Lead a Team of A-Players
- Be on Your Way to a \$10M Exit



**Facts NOT  
FEELINGS!**

**FUN! FUN! FUN!**

# Code of Conduct

- No Distractions
- Be Respectful and Kind
- Be Honest and Vulnerable
- No Pitching
- Ask tons of questions





- **CEO/Founder** of BloomPartners.io
- **4-time** Published Author
- **Stevie Award Winner** Minority-Owned Business of the Year and Silver Medal Most-Innovative Company Under 100 Employees
- Husband, Dog lover, Soccer player, Aspiring Jiu Jitsu Fighter, Sociologist, Philanthropist

I'm not sure if you noticed

**But 2024 was a Dumpster Fire**



**But WHY did this happen??**

1) **HALF of the World  
Participated in  
Elections**



**2) WAR:  
Specifically the War in  
Ukraine/Russia  
and  
Israel/Palestine**

**3) 5 Generations are  
in the Workforce at  
the Same Time  
(for the first time ever)**



# **4) Massive Wealth Inequality**

**5) Technology:  
AI is the Biggest  
Shift in Humanity  
EVER**



# **6) The Rise of Authoritarians**



**Our industry is under attack**



**Our Industry Reputation Has Never  
Been **Worse** Than It Is Today**



So How Do WE Fix it?





Our Job is to Help Our  
Clients to Make More  
MONEY





**What other industry promises results,  
doesn't deliver results, and make it  
acceptable to blame the CUSTOMER  
when it doesn't work out??**



**We Must Take a Stand**

***“The time has come  
for honesty and  
integrity to prevail.”***

## Magic Formula for Scaling Your Agency

**Honesty**

**+ Consistent Client Results**


**+ Business Acumen**

**=**

**Successful Agency That Can Be  
Scaled and Sold**



**Be Truthful and  
Honest with  
Clients and Staff**



**Get Your Clients  
RESULTS**



# **Be Great at Running Your Business**





**You Win!**

**And selfishly, you'll have more  
money than you know what to do  
with.**



Bonus: We Can  
**Make Agencies ETHICAL**  
**Again!**





**I'm Not Going to Let You  
Guys Get Hurt Anymore**



# **If you're committed to holding the highest ethical standard**

And you're committed to being Kind,  
Disciplined and You're Willing to Work Your  
ASS OFF and Serve Your Clients...

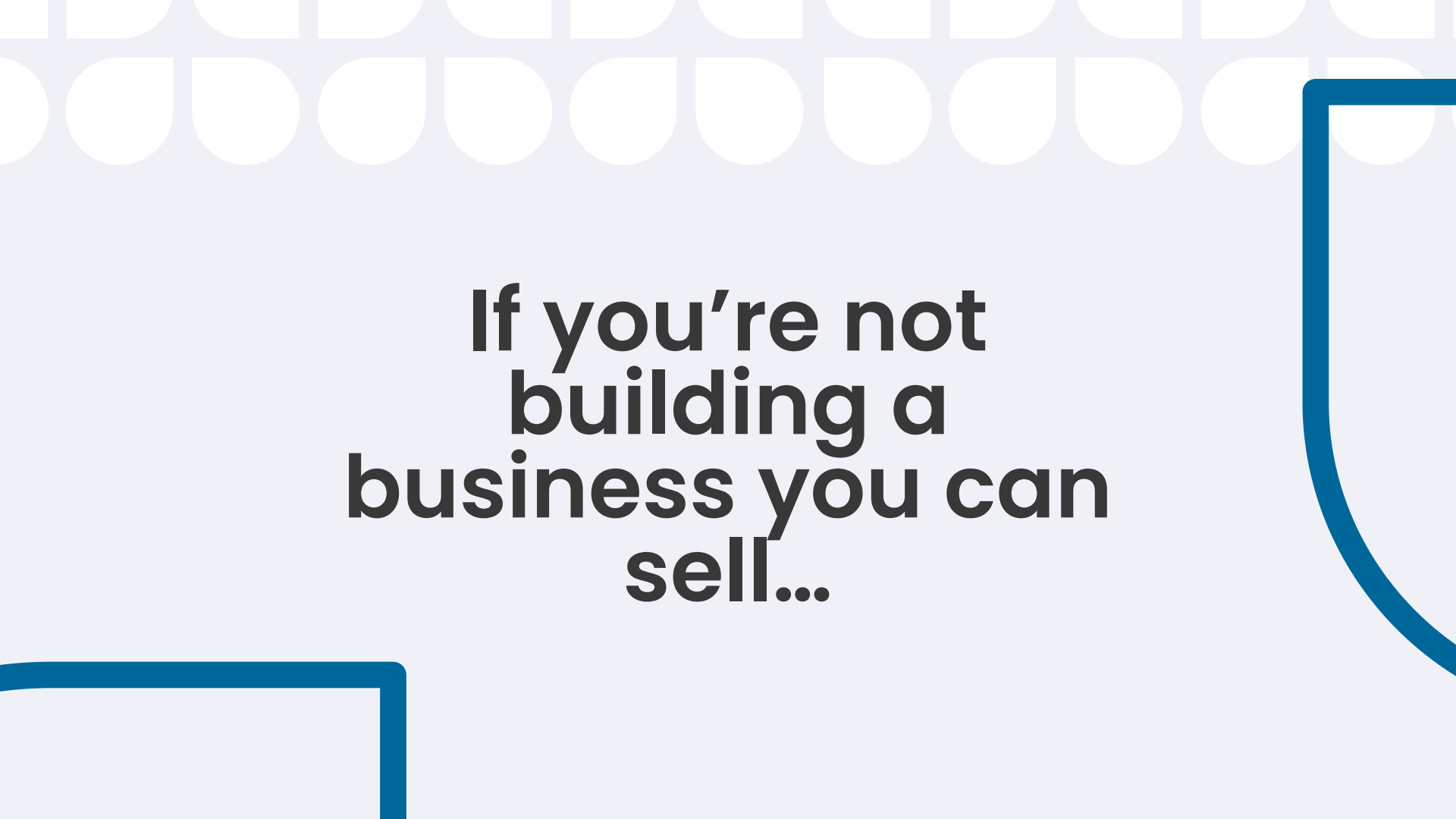


**I'll give you Everything I Got.**



**Does that Sound Fair to You?**





**If you're not  
building a  
business you can  
sell...**



**YOU ARE  
WASTING YOUR TIME**





## Why Sellability Matters

**A business that depends on you  
isn't a business—it's a job.**

Freedom is building something that thrives without you.



## Why We're Here

**A sellable agency is an asset. A non-sellable agency is a burden.**

This is about freedom—not just for you, but for your family



**What's Your Number?**

**Reduce it by 40%**



**Reduce it by 40%?**



**Cut That in Half**


Now imagine you have to live  
on that for the next 5 years.



**Is that enough?**



**Facts NOT  
FEELINGS!**



**What Needs to Happen for You to  
Make this NEW Number a **Reality**?**



**Who do you need  
to BECOME?**

# Common Mistakes That FAILED Agency Owners Make:

- Not knowing their NUMBERS
- Hiring the WRONG PEOPLE
- Not willing to MAKE HARD DECISIONS
- Not holding people (including themselves) ACCOUNTABLE
- Not controlling their EMOTIONS
- No DISCIPLINE
- Not running their business on “FACTS, NOT FEELINGS”



# COMPOSURE



- Revenue
- Profit
- Monthly Salary
- Lifestyle
- Health
- Relationships

**What do you want  
your business to look  
like a year from now?**

What needs to happen  
between now and then  
to make that a reality?

What are you **NOT**  
willing to do to hit  
those goals?

**Launching**



**Validating**



**Developing**



# Professionalizing



**Exiting**





**Get Comfortable Being  
Uncomfortable**



# Break



The background features a repeating pattern of light blue circles on a white background. The circles are arranged in a grid, with some overlapping. The text is centered horizontally and vertically within the frame.

# **Building the Dream Team**

**Scaling an  
Agency is a lot  
like Getting to  
the NFL**



# The 5 Agency Levels

## Level 5: Exiting

\$4M+, 50-80 employees

### State of Business:

\$300k-\$400k MRR  
Consistent Forecasting and Goal Attainment  
30% Net Income  
3% Monthly Churn or Better  
Leaders in Every Leadership Seat  
COO Running Day-to-Day  
\$5-\$10M+ Valuation

Exiting

## Level 4: Professionalizing

\$2M-\$3M, 21 to 41 employees

### State of Business:

\$160k-\$200k MRR  
Two Consistent Lead Generation Channels  
Optimized/Automated SOPs and Reporting in All Departments  
All Products Can be Delivered w/o CEO  
20% Net Income or Better  
3% Monthly Churn or Better  
Leadership Team Members in at least 2 Depts

Professionalizing

## Level 3: Developing

\$500k-\$1M, 11-20 employees

### State of Business:

\$50k-\$80k MRR  
At least One Consistent Lead Gen Channel  
SOPs in All Fulfillment and CX  
15-20% Net Income  
Monthly Churn Below 3%  
At Least 1 Leadership Team Member  
Exec Assistant for CEO  
80% of Products Fulfilled without CEO

Developing

## Level 2: Validating

\$350k-\$500k 6-10 employees.

### State of Business:

\$20k-\$40k MRR  
10-20% Net Income  
Finalized Product Market Fit & Packages  
Niche Selected  
Developing SOPs for Consistent Fulfillment & Client Results

Validating

## Level 1: Launching

\$0-\$350k, 1-5 employees,

### State of Business :

\$0-\$20k MRR  
No Product Market Fit  
No Defined Niches  
Heavy CEO involvement in Fulfillment  
No Consistent Lead Generations

Launching

# The State of the **Marketing Industry** (2025)

- AI is revolutionizing agencies.
- Client demands: faster, better, cheaper.
- The only way to win is to outsmart, not outwork.

# Your 2025 All-Star Team





**Who will you need on  
your team to make your  
2025 goals a reality?**



**What's their  
"One Number"?**






**Who do you  
Need to Find?**



What do you do if you can't  
**AFFORD Who You Need?**



**Job Description Review the  
The MOST IMPORTANT Document  
for Team Members**



**You MUST Learn  
How to Bring Your  
Team With You**

# Break



# The 2025 Financial Plan



**A Buyer will only care about ONE  
THING in your agency..**

**The NUMBERS!!**



# Budget Creation Overview

A thick blue line graphic that starts as a curve on the left and then turns into a right-angled corner pointing downwards and to the right.

**Your budget is  
your plan of attack  
for 2025.**

Without it, you're  
guessing—and  
guessing is failure  
waiting to happen

**It's Not How Much  
You Make...**  
It's How much you **KEEP!!!!**



# **You're Not Here to Make Everyone Else Rich.**

You Deserve to Get Paid What You're Worth



# So What is a Budget?

A plan of how much money we'll make and a plan of how we'll use that money.



# What Does the Perfect Budget Look Like?

- 30/30/20/20
- 30% Cost of Goods Sold
- 30% EBIT
- 20% Operating Expenses
- 20% Owner's Salary

## Write Down:

- Your Revenue (\$ and %)
- Cost of Goods Sold (\$ and %)
- Gross Margin (\$ and %)
- Operating Expenses (\$ and %)
- CEO Salary (\$ and %)
- Net Profit (\$ and %)

# Where Are We At Today? What are the FACTS?

# Where Do We Need to Get To and The Gaps?

- How much Revenue Do You Need to Increase?
- How much do you need to improve your COGS/Gross Margin
- How much Net Profit Do You Need to Increase?



**Let's Create the Plan so We Can  
Close This Gap!**



# We're Going to Start with Revenue

- Write in Your EOY 2024 Revenue
- Write in Your EOY 2025 Revenue Goal
- Write in Your Starting Revenue for January 2025

# Monthly Revenue Goals

- How much revenue do you need to add each month to hit your Year-End Goal?
- How much revenue do you LOSE each month due to churn?
- Now Calculate Your Revenue GOAL each month?

- What is your close rate?
- How many leads do you need each month to hit your sales goals?
- How much are you willing to spend on each lead?
- What is the monthly marketing budget you need each month to hit your monthly lead generation goals?

# Monthly Lead Generation Goals



# Lunch



# Awards





**Robb Bailey**  
And  
**Brian Niebler**

# COGS/Fulfillment Labor

- Enter in all the people you have today under Operations on your org chart.
- Enter in their salaries each month.
- Add in the new people you must add and their salaries.



# COGS Software

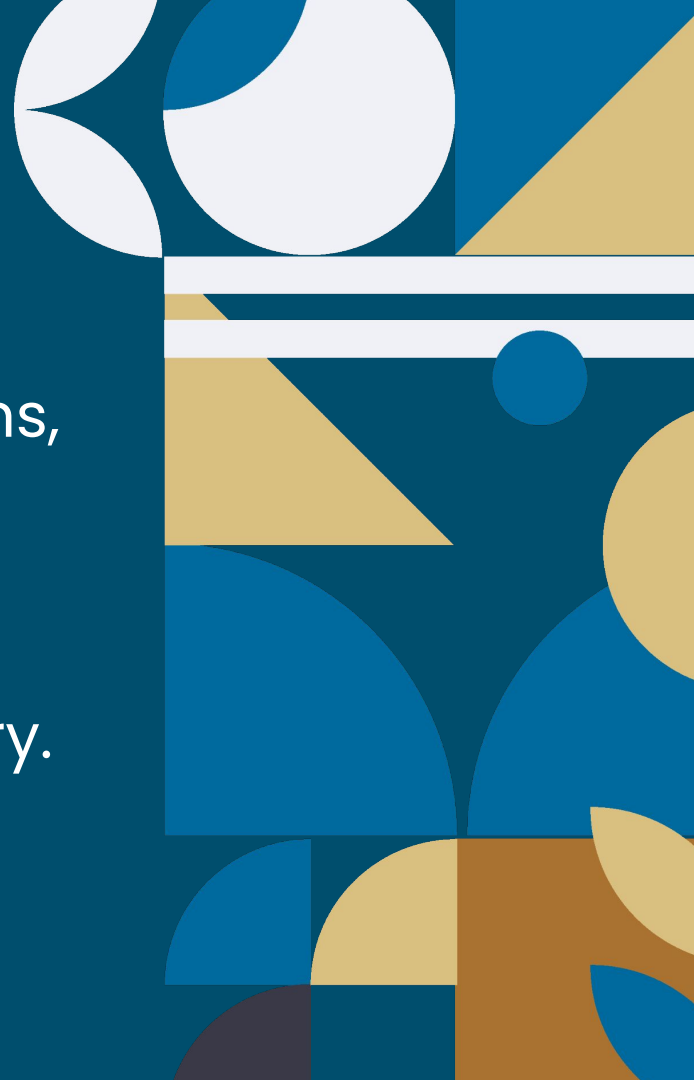
- Enter in all the software you use each month.
- Enter in the monthly cost for each.
- Add in any new software you want to add.





# Operating Expense Labor

- Everyone who is NOT in Operations, write in their name and their monthly salary.
- Add in who you'll need to add to the team and their monthly salary.



# Operating Expense Software

- List out all the OpEx Software that you have now and the monthly cost.
- Add in the software that you'll to add and the monthly cost.



# Operating Expenses

- List out the current Operation Expenses and how much you are spending on each Operating Expenses?
- Add in Your New Advertising Budget to the list.

**Transfer all the  
Numbers to Your  
Annual Budget  
Sheet!**

**If it doesn't work on PAPER**

**It will NEVER work in the  
real world.**



**This is your monthly battle plan.**

**1-2 key actions per month to hit your targets**

This is your monthly battle plan.

# Closing Recap

Today, you laid the foundation: Strategic Plan, Org Chart, Budget.

**"Tomorrow, we add the fuel to the machine to scale it."**

### **Org Chart Activity**

If you're running your agency like a one-man band, your music sounds terrible. Who's your conductor? Your performers? Build your orchestra.

### **Budget Planning**

Your budget is your battlefield plan. Treat it like a hobby, and you'll lose the war.

### **Closing Engagement**

Who's ready to build something that will outlive them? If that's not you, there's the door.

# Interactive Persona-Driven Prompts