

AGENCY MANAGEMENT INSTITUTE'S

# Build a Better Agency Summit



Juliana Marulanda

CEO & Founder, ScaleTime

**2X AGENCY PROFIT:  
Use the Proven 5-  
step SCALE  
Framework**

Learn more. Make more. Keep more.

**ScaleTime**

**SCALE then X<<<< HALE**

# STAGES OF SCALE

**STAGE 3: \$3M-10M**

Get Managers  
To Manage

**STAGE 2: \$1-3M**

Team Deliver Results  
Keep Quality

**STAGE 1: < \$1M**

On Your Mark, Get Set  
Dash To Cash!

Last Year at BABA, attendees of this presentation had 32% completion rate of \_\_\_\_\_



Will you beat them this year?



10 MIN

Design the operations systems that will run without you (& 2x your Profit in 2024).

20 MIN

Find your existing ops gaps that cause your biggest profit leaks.

15 MIN

Ask ops experts all the 2am questions you always wanted to ask.

 0 - 30 Min

 31 - 45 Min



**Design an OPS System**  
**That Runs without you**

**Ask the**  
**OPS Expert**

**See**

**Create**

**Amplify**

**Lead**

**Exit**

**Q&A**

Corporate Dropout → 20+ years of ops  
**Helped 600+ Agencies in 5 Continents**



BEFORE



YEAR 1




YEAR 2



YEAR 7





What's the  
**BIGGEST**  
OPS Gap?





**NEW MAGICAL  
OPS HIRE**



**FANCY OPS  
CONSULTANT**



**EOS / E Myth / 3rd Party  
OPS SYSTEMS**

**FAILED SOLUTIONS**

↓25%

Operating Costs

↑3x

Scalability

↑10x

Peace of Mind

**REAL SOLUTION:**

Operations that

S C A L E

*So it can SCALE without You*



**Build a Business that**  
**Runs**  
**without You**



**SEE ...**  
WHAT'S HAPPENING

**CREATE ...**  
A BASELINE

**AMPLIFY ...**  
HOW YOU DO IT

**LEAD ...**  
AND DELEGATE

**EXIT ...**  
AND OVERSEE

# -374 → 31% Client Profitability (Cut team in ½)

## Guillermo, Geek Powered

7-figure agency blew past 1.3m plateau

### How the biz changed

From profit loss to profit share program

Owner worked 20/hrs a week

### How life changed

**Before:** Working 60 hours a week with an inflated team

**After:** Only works during the week and has 2 kiddos





14 team members  
1.7 Rev  
2X Revenue  
-374 → 31% Client Profitability



# Profit Loss to **PROFIT SHARE!**



**Owner**

## BUILD

Strategy & Decisions

1 hr per week

## RUN

Sales & Vision

10- 30 hrs per month

**OPS Gladiators**

## BUILD

Implementation

4 hrs per week

## RUN

Day to Day  
Operations

20-30 hrs per week





Guillermo Ortiz | CEO

14 team members  
2X Revenue  
-374 → 31% Client Profitability

# Profit Loss to PROFIT SHARE!

See

62% operational performance



Create

Client Onboarding  
Client Management  
Project Management  
Hiring & Onboarding

BANDWIDTH MATRIX			
Team	Short-Term Priority	Short- & Mid-Longterm	Medium- & Longterm
Project	Accounting/Finance	Strategy/Accounting & Budgeting	Financial Reporting
Client Management	Client Setting	Managing Sales Pipeline	Customer Life Cycle
Quality Assurance	Business	Support	Business Management Data Analysis
Marketing	Business	Digital Marketing/Social Media	Digital Production/Content/Brand Assets
Productivity	Organization Time Mgmt	Workflow & Tools	Production and Capacity Management
Team	Collaboration	Recruiting/Building a team	Human Resources
Team Lead	Create a Team	Monitor Team Progress & Performance Metrics	Run Day Operations

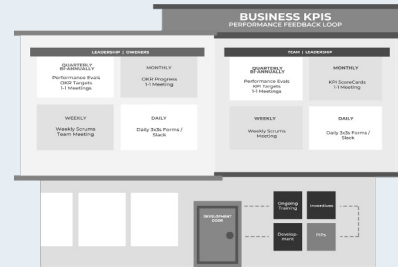
Amplify

Fired Clients  
Fired underperformers  
Put in KPIs



Lead

Client Profitability - 352 → 31%  
Created Profit Share  
Increased Client Retention to 92%



Exit

Works weekdays only  
Only focuses on Sales and Strategy



# Guillermo's Before & After Diagnostic

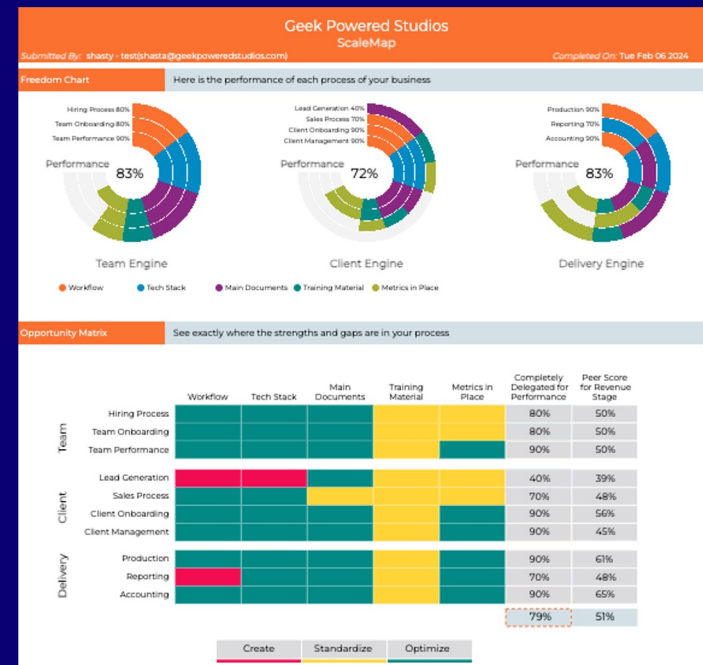
**-354%**

**Client Profitability**



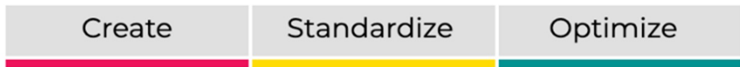
**31%**

**Client Profitability**



# It's Your Turn

		Workflow	Tech Stack	Main Documents	Training Material	Metrics in Place	Completely Delegated for Performance	Peer Score for Revenue Stage
Team	Hiring Process						0%	33%
	Team Onboarding						50%	38%
	Team Performance						30%	37%
Client	Lead Generation						30%	42%
	Sales Process						70%	47%
	Client Onboarding						30%	51%
	Client Management						40%	43%
Delivery	Production						40%	59%
	Reporting						40%	43%
	Accounting						10%	58%
							34%	45%



**DO IT WITH ME NOW**

- **50 OPS GAPS**
- **5 MIN DIAGNOSTIC**
- **5 HRS SAVED**
- **50k/Q SAVED**

Take the ScaleMap



*bit.ly/myscalemap*

Forbes LinkedIn Entrepreneur **SBA** U.S. Small Business Administration TechRepublic.

**ScaleTime**

*Do you have a checklist or flowchart? Is there a specific sequence for the repetitive tasks / projects that your team members can follow?*

2→ Workflows

a Do you have a Workflow for an...

	Yes	No	Kind of
Sales Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Onboarding	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production / Project Mgmt	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Client Management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Client Reporting	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hiring	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Team Onboarding	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Powered by Typeform

ScaleTime





# SEE WHAT'S HAPPENING

*"The first step towards getting somewhere is to decide you're not going to stay where you are." — J.P. Morgan*

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✓ **See the profit** so you can go after it

⊘ Profit Blindness **Burns Cash**





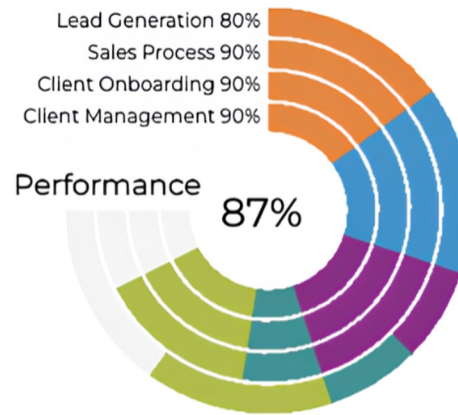
# 3 Engines

## Freedom Chart

Here is the performance of each process of your business



Team Engine



Client Engine



Delivery Engine

● Workflow

● Tech Stack

● Main Documents

● Training Material

● Metrics in Place

# CREATE A BASELINE

*What gets measured, gets managed*

*- Peter Drucker*

Me

Hey, design is due EOD.

You done?

John Employee

Uh, Whoops, nope!

I'll do it tomorrow!

That's a great point!

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✓ Reclaim control with  
**ops dashboards...**

⊘ No

- metrics,
- baseline,
- management,  
**or control**

GetGuru Knowledge Base Maintenance | GetGuru - SOP conversion | Board | Table | + View

Search tasks... | Group by: Category | Subt

Task	READY FOR REVIEW	NEEDS TO BE UP...	STAGE	CATEGORY
<b>v Client management - Succe...</b>   Success Champions   2 TASKS				
Client Maintenance   Client Reminders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Needs a rewrite	v Client mana...   Success C...
Client Maintenances   Pre-Session Prep	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Be Archived	v Client mana...   Success C...
+ New task				
<b>Operations</b>   Products   3 TASKS				
Creating an assessment in Kajabi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Updated in Get...	Operations   Products
Adding Content to Kajabi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Updated in Get...	Operations   Products
Updating Dates at the end of the year in Kajabi	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	Operations   Products
+ New task				
<b>ScaleTeam</b>   Sales   1 TASK				
Onboarding of New Salesperson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Updated in Get...	ScaleTeam   Sales
+ New task				
<b>v Client management - Succe...</b>   23 TASKS				
Client Maintenance   Client Scorecards	<input type="checkbox"/>	<input type="checkbox"/>	Updated in Get...	v Client mana...
Client Maintenance   Client Communication	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Updated in Get...	Client mana...
Client Maintenance   Offboarding Steps	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Updated in Get...	v Client mana...

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# What Dashboard Do you Need?

To make data powered decisions



Production

Financials

Marketing

Sales

Client Mgmt

HR

ScaleTime

*Are you using any tools/ apps/ SaaS to help your team accomplish responsibilities and collaborate?*

3 → Tech Stack

a Are you using any tech for any ...

	Yes	No	Kind of
<b>Sales Management:</b> Copper, Hubspot, Pipedrive etc	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Client Onboarding:</b> docusign, echosign, hellosign	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Project Management:</b> Asana, Teamwork, Clickup, Trello etc	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Client Management:</b> help scout, groovehq, keeping, zendesk	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Client Reporting:</b> ninjacat, swydo, dashthis, glew.io	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Hiring:</b> streak, job descriptions, zenefits, hrcloud	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Team Onboarding:</b> performance / progress evaluations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

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# AMPLIFY HOW YOU DO IT

*Standardized, Repeatable,  
Scalable Experience*

ScaleTime

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✓ **Get team to deliver results** without losing quality

⊘ **You're babysitting** either your clients or your team.



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*Are you using repeatable assets and frameworks, so you are not reinventing the wheel?*

4→ Main Documents

a Is there support materials / te... Kind of

<b>Sales Management:</b> ideal client, discovery call scripts, objection, sales sheets, case studies	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Client Onboarding:</b> asset/credential intake, client brief, kickoff agenda, communication guidelines	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Project Management:</b> signoffs, change orders, client briefs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Client Management:</b> call notes, agendas, surveys, etc	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Client Reporting:</b> goals benchmarks, notes templates, account growth sections	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Hiring:</b> job posts, interview questions, timeline	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Team Onboarding:</b> onboarding handbook, welcome email, etc	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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ScaleTime

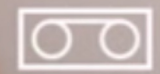
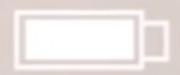




# LEAD AND DELEGATE

*Ownership creates Leadership*

SAD CAM



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## Management

- ✓ Team meeting
- ✓ 1-1 check-ins
- ✓ Work product review
- ✓ Unstructured feedback
- ✓ Positive reinforcement
- ✓ Policy / Process / Procedure rollouts
- ✓ Engagement/pulse checks
- ✓ Invitations to culture events
- ✓ Stay interviews
- ✓ Difficult conversations

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## Developmental Coaching

- ✓ Motivation/incentivization
- ✓ Ongoing training
- ✓ Performance reviews
- ✓ Performance improvement plan
- ✓ Growth path

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## Hiring

- ✓ Interviews
- ✓ Negotiations
- ✓ Offer
- ✓ Keep warm
- ✓ Rejection

## Onboarding

- ✓ Training
- ✓ Acculturation
- ✓ Acclimation
- ✓ Intro period benchmarks

## Offboarding

- ✓ Firing/layoffs
- ✓ Exit interviews

[ 26 Mgmt Conversations ]

*I'd like my  
manager to be  
50-65% billable...*

***But WTF are  
they doing all  
day?***

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✓Get managers to  
**MANAGE**

⊘ You're paying people  
and **doing their job for**  
**them.**



*Are you using instructions/ videos/ screenshots or an internal knowledgebase to train and increases productivity by 25%?*

5 → Training

a Is there training created for thi... We got  
instructions intranet nadal

Sales Management:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Onboarding:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Project management:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Management:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Reporting:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hiring:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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*Are you or your team collecting any Numbers, Metrics, KPIs, or OKRs to make data driven decisions?*

6 → Metrics

a Are you tracking any metrics f... Kind of

<b>Sales Management:</b> closing rate, sales cycle, hold rate etc.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Client Onboarding:</b> deployment turnover	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Project Management:</b> time deliverables, backlog	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Client Management:</b> long term value, account growth, satisfaction score	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Client Reporting:</b> % in budget, increase in adspend	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Hiring:</b> recruiting costs	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Team Onboarding:</b> ramp up period, employee roi	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>Accounting:</b> profit margin, revenue growth, accounts receivables	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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# EXIT AND OVERSEE

*"The best way to predict your future is to create it." — Abraham Lincoln*

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**MAKE YOURSELF  
OPTIONAL.**

WEEKEND  
EXIT

1-MONTH  
FAMILY EXIT

CASH EXIT

VALUATION  
EXIT

ScaleTime



ScaleTime



*Who is responsible for doing the work so that the process creates results in the business?*

7 → Ownership  
a Who currently owns this process...

Sales Management	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Onboarding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Project management	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Hiring	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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*So it can SCALE without You*



**Build a Business that**  
**Runs**  
**without You**

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# RETURN ON INVESTMENT

Your Possibilities

6 weeks

3 months

6 months

**Return on Money** 💰

3x ↑ Client Capacity

25% ↓ Costs

2X ↑ Profit

**Return on Energy** ⚡

↑ Better REM sleep

20% ↑ Quality Time for ❤️ones

10X ↑ Peace of Mind

**Return on Time** ⌚

2 Weeks Off-grid

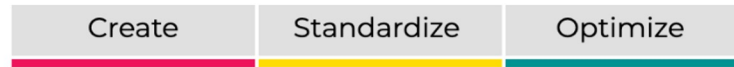
1 month vacay

5x Sales Multiple

# ScaleMap Diagnostic: Get Your Custom Results in 24 hours

## Operational Gaps and Opportunities

		Workflow	Tech Stack	Main Documents	Training Material	Metrics in Place	Completely Delegated for Performance	Peer Score for Revenue Stage
Team	Hiring Process						0%	33%
	Team Onboarding						50%	38%
	Team Performance						30%	37%
Client	Lead Generation						30%	42%
	Sales Process						70%	47%
	Client Onboarding						30%	51%
	Client Management						40%	43%
Delivery	Production						40%	59%
	Reporting						40%	43%
	Accounting						10%	58%
							34%	45%



Free a minimum of 5 hours a week on average

ScaleTime



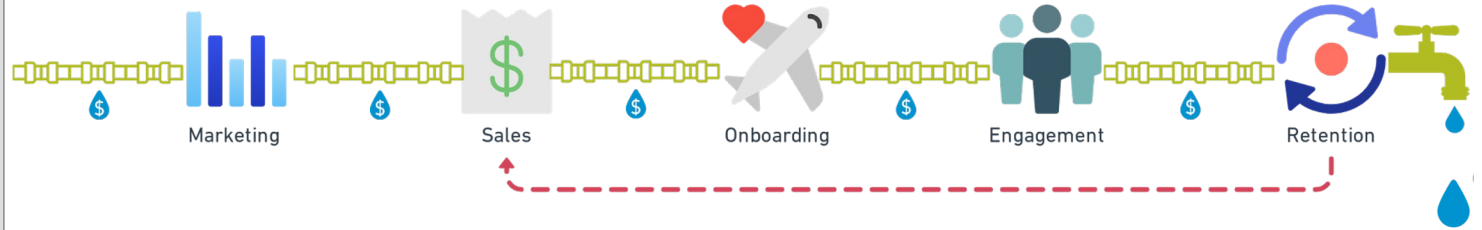
Questions →



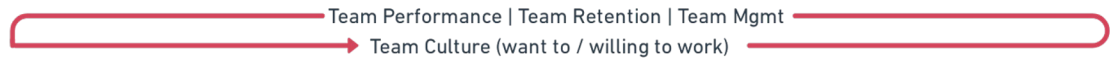
PROFIT & LOSS STATEMENT

Income	\$X,XXX,XXX.90
Gross Profit	\$ XXX,XXX.73
Selling	\$X,XXX.43
General	\$XXXXX.73
Administrative	\$XXX,XXX.73
Operating Expenses	\$XXX,XXX.73
Taxes	\$XX,XXX.73
Net Income	\$XX,XXX.73

## 29 Profit Leaks : CASH goes to DIE



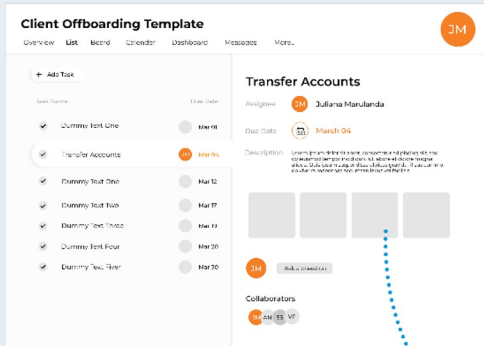
# Leaks	Marketing	Sales	Onboarding	Engagement	Retention
	TTM: Time to Market Pricing Model ROI/ROAS: Return on Inv COA: Cost of Acquisition Attribution visibility	Scope Creation Slow/ No Followup Sales Cycle Closing Rate Misaligned incentives	Refunds/Charge-backs Lose Client Confidence Scope Change Time Tables Shifts Inacurate resourcing	Management Overhead Utilization of team Scope creep Production Delays Communication (meetings)	Contract Renewals Up-sells Cross-sells Ad-ons Firing Clients



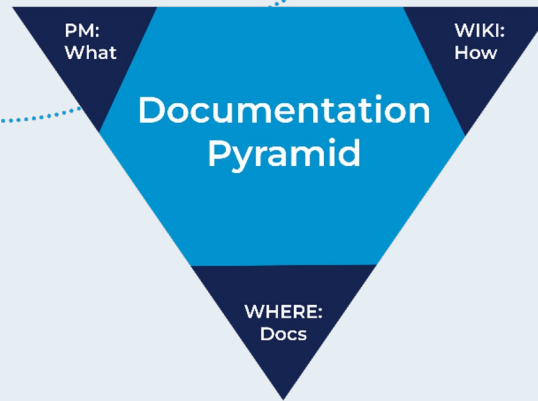
Systems	Marketing	Sales	Onboarding	Engagement	Retention
	Lead/ Demand Gen Process Lead Conversion Systems Reporting	Sales Process Rev Operations	Onboarding Process	Client Management Project Management Reporting Process Hiring and onboarding	Client Management Onboarding process Revenue Operations

Team	Marketing	Sales	Onboarding	Engagement	Retention
	Strategists Marketing Managers Creatives	Owners SDRs Sales Reps Sales Managers	Account Managers Strategists Team Leads/ Management	Account Managers Project Managers Production Team Leads/ Management	Account Managers Strategists

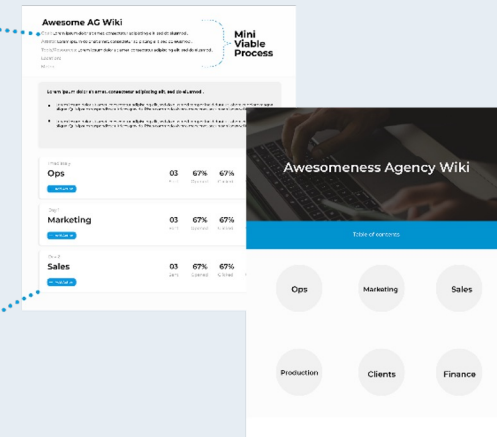
**Project Management Tool**  
What you need to do; is being done.



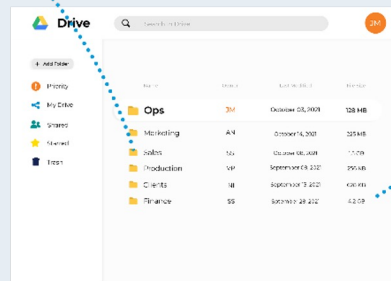
**Same Structure = Easy Access**  
Increase in productivity



**Internal Knowledge Base**  
SOP's are how you do things

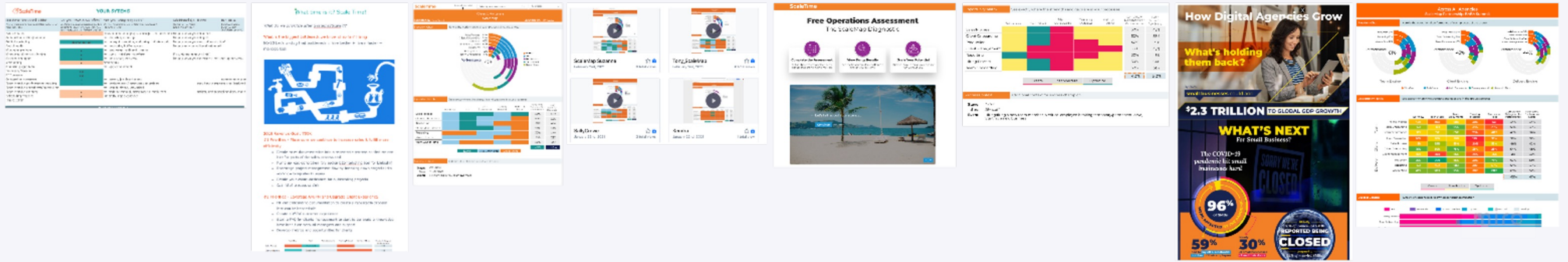
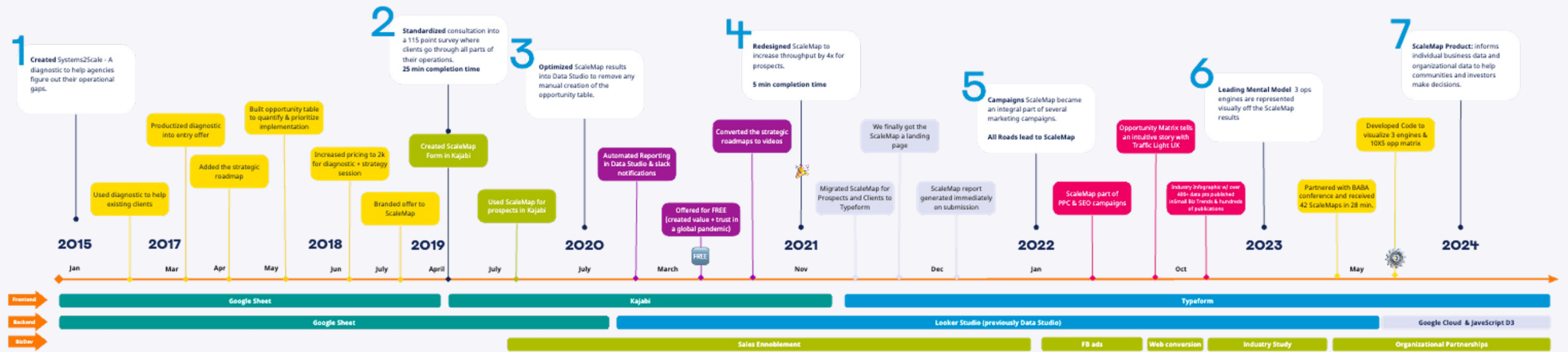


**Document/Assesst Management**  
Where your stuff lives



**Pro Tip: Create a Wiki with a table of contents**

# Operations Industry Study with over 600+ Participants



Participate in our Study!

ScaleTime

# Scaled after Firing Biggest Legacy Client

(Cut team in 1/2)

## Jeff Conlon, IMA

7-figure agency fired biggest client (100k/month) and lived the urban legend

### how the biz changed

- “Everything [in Notion & Asana] is dialed in” -Jeff
- Project Manager went on maternity leave and scheduled Q4
- Owner worked 20/hrs a week
- Recuperate 100k MRR with right fit clients

### how life changed

**Before:** Working 75 hours a week with an unproductive team and clients that made it miserable to go into office

**After:** time to teach the kiddo how to play guitar and consistent date nights with the wifey

