

**24:04**

Drew McLellan

All right, it is the top of the hour and I want to be respectful. Everyone's time, and we have a full.

**24:09**

Drew McLellan

90 minutes of content to share. So I want to make sure we.

**24:14**

Drew McLellan

Get everybody in the room and going. So if we have not met before, I am Drew McClelland, co owner of Agency Management Institute.

**24:26**

Drew McLellan

Super excited to have Marcus Sheridan and Chris Maher with us today to talk about a challenging issue for everybody, which is how to give your AES more authority and more confidence so that they.

**24:39**

Drew McLellan

Can really control the room and have.

**24:42**

Drew McLellan

The client's confidence and not pull you into all of that every time they turn around.

**24:49**

Drew McLellan

So it's going to be a great 90 minutes. We are recording it. As I have said a couple times, I am not authorizing anybody's note taker.

**24:57**

Marcus Sheridan

Not.

**24:57**

Drew McLellan

Not because we're going to be talking about secrets, but because I'm worried about capacity in the room. And so every note taker takes up a seat. So my note taker is going.

**25:07**

Drew McLellan

I will share my notes with the.

**25:10**

Drew McLellan

Replay of the video from this. So you're not going to miss out anything. You'll have the full notes. I just can't have a hundred of you all taking notes. So I promise it'll be part of the replay.

**25:20**

Drew McLellan

All right, I want to introduce our co presenters today. So Marcus Sheridan and Chris Marr are here. Many of you are familiar with both of them.

**25:31**

Drew McLellan

You've read their bios when were promoting the webinar.

**25:34**

Drew McLellan

So I'm going to let them introduce themselves.

**25:36**

Drew McLellan

And I want to get to the content as quickly as possible because we have a full 90 minutes to go.

**25:41**

Drew McLellan

So, Marcus, I think you're going to kick us off.

**25:44**

Drew McLellan

Yeah.

**25:45**

Marcus Sheridan

Yeah.

**25:45**

Marcus Sheridan

Well, let's do this, Drew.

**25:47**

Drew McLellan

And thank you.

**25:48**

Marcus Sheridan

Yeah, thank you, brother.

**25:49**

Marcus Sheridan

And excited to be here with the MI community. We're going to have an exceptional day. I'm going to ask everyone to lean in today, and I mean really lean in.

**25:58**

Marcus Sheridan

Like the old saying goes, wherever you are, be there. Let's make sure we're with each other.

**26:02**

Marcus Sheridan

For the next 90 minutes. I'm coming to you from a hotel room in Idaho, going from one event to the other, and there's nothing in the world that I'd rather be doing.

**26:09**

Marcus Sheridan

Right now than talking to you all.

**26:12**

Marcus Sheridan

About a subject that I'm incredibly passionate about. And as mentioned, I'm going to be running this webinar today in conjunction with.

**26:22**

Marcus Sheridan

My very good friend, Chris Maher.

**26:24**

Marcus Sheridan

I'm going to introduce Chris. He's going to introduce me because nobody likes to brag on themselves, but I am more than happy to talk about this guy. I met Chris Maher about a decade ago. He was reading my stuff and they Ask youk Answer. And he was one of the original thought leaders in the UK on all things content marketing. And I spoke at his event, the what was called the Content Marketing Academy. And at the end of the day, something really crazy happened. I spoke to his community. He had a community there. At the end of the day, they said, we love this whole they ask you answer stuff, but could you teach us how to present and communicate the way that you did with us today? And I looked at Chris and I said, no. One has ever asked me that before.

**27:08**

Marcus Sheridan

And it led to a really beautiful relationship where we started to teach communication workshops around the uk, specifically in Scotland, which is where Chris is from.

**27:19**

Marcus Sheridan

You'll find out very quickly that's where he'll. That's where he's from.

**27:22**

Marcus Sheridan

And he picked it up, this whole system of communication faster than anyone I've ever seen. And we have a book coming out on this next year that I'm incredibly excited about.

**27:33**

Marcus Sheridan

I think it's going to change the world.

**27:35**

Marcus Sheridan

And we're starting with account managers and.

**27:38**

Marcus Sheridan

Agencies because we're so passionate about this industry.

**27:41**

Marcus Sheridan

So that's Chris. Chris, back to you.

**27:44**

Chris Marr

Hey everyone. Good to see you all. I'm glad we're here, ready to do this work.

**27:48**

Marcus Sheridan

Yeah.

**27:49**

Chris Marr

Like Marcus said, we've been working together for over 10 years now. I think it's getting close to 15. And like Marcus said, the stuff that we're teaching today was stuff that we've been building on probably for about 10 years now. As you know, Marcus is joining us from. He's on the road. He mentions in a hotel room here. He's actually on a 19 day stint as a speaker speaking from loads of different stages. Now. The great. What I love about Marcus is that he speaks about. You probably know him as the pool guy, right? You've probably heard he's the pool guy. He's the author of they Ask youk Answer more recently, Endless Customers. Right. But he's on the road speaking to marketing teams, leaders, sales teams, lots of different businesses all over the world and has been doing that for decades now.

**28:33**

Chris Marr

And what I love about Markus is he's able to bring all of this stuff. He's got many different businesses, a couple of AI businesses and agency, lots of different enterprises, this business here in communication. But he's able to draw this red thread through everything to bring it all together for everybody with this. Like, what I love, Marcus, is you've got this like future look on business. Like everybody's looking to you what's going to happen next? How do we use AI? How can we communicate better and how can we make sure that we're doing the right things to grow our business? So it's taking all these complex ideas and making them really simple and everybody's going to get a great look at that today, especially the transformation that we can make through these communication frameworks that we're going to do today.

**29:13**

Chris Marr

So I'm excited to be here, Marcus. It's great to be working with you.

**29:16**

Marcus Sheridan

You too, brother. All right. So really Quick, I just want everybody to use the chat for this and I'm going to ask you to use the chat a few times today. But for this one specifically, I want you to put in and please participate when we ask you to in the chat. This is really important. There's going to be a few times today when we call on you. When we call on you, we. What's going to happen is I'm going.

**29:37**

Marcus Sheridan

To say, hey, Drew, pick a couple.

**29:38**

Marcus Sheridan

People from the audience and when he.

**29:40**

Marcus Sheridan

Picks those people, you're going to hear.

**29:42**

Marcus Sheridan

Your name and then I'm going to jump in and I'm going to call you after he's called you. So it's going to be like a forewarning. And don't worry, we're not here to embarrass anyone. We're just here to work with you in a few ways. Plus it gives you a chance to see how we do these in depth trainings that we do with ams. And it's a beautiful transformation that can take place if you just get used to having these real time conversations in front of others. Okay, so in terms of what we need to do, you need to do specifically to get the most from these next 90 minutes, what would you say that is? What are some of the ones that are coming in so far, Chris, that.

**30:16**

Marcus Sheridan

You're, that you're seeing that are catching your eye?

**30:19**

Chris Marr

Well, I've not had anything yet, but we've got, oh, Kim's here, be present. Kim is saying, turn off my email, turn off teams, be here. Yeah, that's really one of the most.

**30:28**

Marcus Sheridan

Important ones that one of the big difficulties to an event like this and a training is you're going to be tempted to still have your distractions on. I'm telling you now for the next 82 minutes, please turn those off. Be fully with us because you're going to hear some things. They're going to have a big impact on how you're able to affect clients and how you're able to carry yourself on a day to day basis.

**30:51**

Marcus Sheridan

Anything else catching your eye there, Chris?

**30:53**

Chris Marr

Taking notes is coming up many times here.

**30:56**

Drew McLellan

Yeah.

**30:56**

Chris Marr

How do you feel about taking notes today, Marcus?

**30:58**

Marcus Sheridan

Yeah, well, we're going to supply you those notes and those notes are. It's good to write it down, but I would just say that this is one of those subjects where you're going to have to practice it literally every day for the rest of your professional life, just like I do, just like Chris does. In order to the communicator that you can be and transform others the way.

**31:19**

Marcus Sheridan

You could potentially transform them.

**31:21**

Marcus Sheridan

All right, one more, Chris, before we move on.

**31:23**

Chris Marr

Participation.

**31:25**

Marcus Sheridan

Yeah.

**31:25**

Marcus Sheridan

So I think it's a core of our culture at Question first group. I know it's a big deal at ami, but let's make sure we are fully engaged. So when we ask you those questions, throw them in chat just like you just did. Thank you for that. Please don't be too cool for school. If you have a question, you can put it in chat as well, and.

**31:43**

Marcus Sheridan

We'll do our best to answer it.

**31:44**

Marcus Sheridan

Okay, so with that being said, we believe in real role plays. We're going to do some role plays today. We call them real role plays, though, and this is the important component of the semantics of this. It's interesting to me how many folks roll their eyes whenever they hear the phrase roleplays. We don't want to do that. In fact, Chris, you've been doing a ton of role plays with AMs, and you get to see this firsthand for yourself. Real quick thoughts on role plays before we move on, because this is foundational to our conversation and everything we believe in.

**32:23**

Chris Marr

Yeah. I think the ones that lean in and the ones that treat them as if they're real are definitely the ones that get the most transformational results. We're going to share a story at the end of this workshop today, actually, which shows you the power of investing in role plays within your team.

**32:37**

Drew McLellan

So.

**32:37**

Chris Marr

Absolutely, Marcus, it's like it's an investment in yourself, it's an investment in your team. You can't learn to swim by reading a book. And therefore, the way to actually practice communication is to treat these role plays as real and get into them so you can practice on each other instead of practicing on your clients.

**32:57**

Marcus Sheridan

So let's talk about some of the threats that we have as agencies. The numbers I'm about to share with you are absolutely arguable. We don't know these things for fact. But what we do know is when we look ahead to AI and how it's affecting our ability to offer services as agencies, we've got some major threats. Because if we take the majority of agencies that are on this call right now, and if I said to you, what's your revenue pie chart like? Where does your revenue come from? Well, many of you are doing paid ad services, many of you are doing website design, many of you are doing SEO, and many of you are doing some type of social media services for your clients.

**33:34**

Marcus Sheridan

All right, now, with that being said, and we have now polled hundreds of agencies, we've been talking to many about this, we've talked to many AI experts. I've been deep diving into this myself. And here's what we have a general sense for. All right, and it's, again, this is debatable, but this is rough numbers. Within the next five years or so, there's a pretty solid chance that AI is going to take away the majority of our paid ad services. There's a pretty solid chance that they're going to take away roughly 75% of our web design services. Now again, it could be 50%. Maybe it's even better than that. But let's just call it for what it is. SEO services going to take a big hit, roughly 75%. And for social media, 50%.

**34:21**

Marcus Sheridan

Now again, I know because some people read this and say, I don't agree with that. I know some of you think it's higher, some of you right now think it's lower. But we can all agree this AI, once the masses really start to learn how to use it, and once the tools get better and better, they're going to take away some of those traditional services that we offer as agencies. If this is true, where does that leave us? Well, where it leaves us is what must we do in order to have a viable business model moving forward. Because in the past, if it was primarily SEO and paid, the future, number one, first and foremost, is we must, as agencies, in my opinion, and certainly our opinion at question first group, and I think Drew agrees with me here, become indispensable.

**35:09**

Marcus Sheridan

That's the key phrase, strategic guides to our clients. They cannot imagine a world without us.

**35:17**

Marcus Sheridan

They feel like I could cut everything.

**35:19**

Marcus Sheridan

But I'm not cutting my team. That would be you all who are watching this right now. Indispensable strategic guides. Are your ams indispensable strategic guides. Right now I think a major component of the future is certainly going to be AI training. We're going to see that more and more. And the great agencies are not going to ignore the AI and the AI training possibilities, but they're going to have a whole wing of their agency that offers this. And I think agencies are going to do much more when it comes to offering self service tools for their

clients. You've probably heard me talk about that in other places. We're not going to talk about that today because today we're leaning into the first one. How you can become as an agency indispensable and be viewed as a strategic Guide to your clients.

**36:05**

Marcus Sheridan

So we have a dilemma, though, and this is why the future, which to.

**36:10**

Marcus Sheridan

Me is very exciting, we're not necessarily.

**36:13**

Marcus Sheridan

Ready for it because of this dilemma so many account managers currently face within the agency space right now. Couple stats for you that we think you're going to find pretty interesting. Number one, 68% of clients who leave agencies cite a lack of proactive strategic guidance as the reason. It's an interesting phrase there, Chris. Proactive strategic guidance, otherwise known as we have too many yes people. When you look at that phrase, when you think about that, how do you see it affecting the agency in the AM space?

**36:54**

Marcus Sheridan

Chris?

**36:56**

Chris Marr

Right. So what we do typically is we wait for problems to occur before we deal with them. Right. When you think about proactive, what we teach is account managers to actually invite tension into the relationship to challenge your clients. Be proactive about bringing that about. But when we're yes people, we tend to sweep things under the carpet. We tend to not point out the mistakes that our clients are making. And we certainly don't challenge our clients either. We tend to just say, yep, we'll get right on that. And we wait for the problems to.

**37:29**

Chris Marr

Happen before we deal with them.

**37:31**

Drew McLellan

So Chris said something, guys, just so you know, AMI data, with our research.

**37:36**

Drew McLellan

Actually, this number is even higher.

**37:38**

Drew McLellan

So totally.

**37:39**

Marcus Sheridan

What is the new research with this?

**37:40**

Drew McLellan

But I'll just say our numbers are even higher.

**37:42**

Marcus Sheridan

All right, well, that is great verification.

**37:44**

Marcus Sheridan

At least we know we're tracking in the right direction, Drew. So thank you for that. And clearly, we've got to be the most proactive. And hopefully everybody heard Chris say a phrase there. He said, invite tension. Are you guys inviting healthy tension to the relationship?

**38:01**

Marcus Sheridan

Today, we're going to look at that even further. Certainly, we're going to look at that. Okay.

**38:04**

Marcus Sheridan

57% of clients cite poor communication and transparency as the reason they ended their agency partnership. So we're having a problem being honest and articulating what our value is and just the overall state of the relationship. And I'm sure many of you can agree. So the question is, why is this happening? Well, here's what we've found in our studies. And, Drew, I'd be curious to get your thoughts on this.

**38:36**

Marcus Sheridan

Of course.

**38:36**

Marcus Sheridan

At any point in time. And by the way, everyone that's listening, I've told. We've told. Drew, please, at any point, just jump in and share any of your observations as well. Less than 5% of AMs have received consistent, organized role play training on how to effectively speak to clients. In fact, we want to do a quick poll on this just to check everyone. Okay, how many times. And everybody, please put this in the chat. Have you received actual communication training. Communication training in the last year? Now, if the answer is zero, put in a zero. But I want everyone right now, if you would please to put in chat what the number is. And this is going to tell us as why we have so many problems.

**39:29**

Marcus Sheridan

The ultimate leading indicator of whether or not you're going to become an indispensable strategic coach and guide to your clients is this right here. This number right now. So, Mark, what are some of the numbers that you're seeing? What's the averages that we're seeing across the board?

**39:50**

Chris Marr

The average is somewhere between 0 and 1. I think a lot of zeros came in right out the gate there. I think we even got. We've got some negative numbers.

**39:58**

Chris Marr

Someone put minus.

**39:59**

Chris Marr

Oh, no. Between one and three. So zero looks like the most common number. And we've got a couple of outliers who are clearly doing great things, but mostly everybody has 0. Not consistent. Even somebody saying here, when I find this again, yeah, this is. Carla said, even though I have begged my supervisors to train me, to give me training, so it's clear that. My guess is that a lot of people want it, but can they. Can they get access to it?

**40:31**

Drew McLellan

Yeah.

**40:31**

Marcus Sheridan  
Well, what we.

**40:32**

Marcus Sheridan

What we just described is the core problem that we are obsessed with solving. And that's why Drew and I and our team, we're excited to be working together to solve this problem. We believe we need to stop practicing communication when stakes are highest. Sweet. Carla saying, hey, I. I want more training. But the problem is, the only training she's getting on communication is when she's actually talking to a client and stakes are highest. It should get easier when we're speaking with the clients because we've gone through such wonderful training and helpful training that it gets just easier from that point on. So we're going to look at that. Until account managers become elite communicators, no agency is going to reach its true potential. Furthermore, we need to stop being yes people and start being seen as a true authority and trusted advisor.

**41:40**

Marcus Sheridan

Now, another question for you. And I just want you to say yes or no in chat. Yes or no in chat from this, which is. Have you ever had a time with a client where you didn't say what needed to be said because you were worried more about keeping the client than you were about being honest with the client? So just say yes or no. We're not Putting anybody on the spot here. But just yes or no, has this happened to you? Certainly as an account manager and I know there's some owners here, some leadership team members. Has this ever happened to you, Mara, what's some of the results that you're seeing there?

**42:28**

Chris Marr

Yeah, I think we've got like an 80, 20 split here, for sure. Everyone. Mostly yeses, I would say.

**42:35**

Marcus Sheridan

Yeah, mostly. Mostly yeses. And this is one of the major.

**42:40**

Marcus Sheridan

Issues that we see.

**42:41**

Marcus Sheridan

All right, so with that, Chris is going to talk about how we can solve this and he's going to share with you something I think is going to be a very interesting. It's an interesting phenomenon that happens within the AM space.

**42:57**

Chris Marr

Yeah, let's get into it. So what I want to talk to you about is the respect paradox. This is a quick model. I'm going to just give you an overview of it to give you a sense of the journey that we're on. I have been obsessed with this idea of high need to be liked and people pleasing in client services for years now. And as part of that journey of all the experience I've had, I actually came up with a model that sort of share that shows you what that journey actually looks like. It's called the respect paradox. And when you look at the. When you look at the slide here, you see three axes.

**43:28**

Marcus Sheridan

Slide.

**43:28**

Marcus Sheridan

Right.

**43:28**

Chris Marr

Now you don't see the slide. Do you guys? Anyone see the slide? Have we got the slide?

**43:32**

Marcus Sheridan

Oh, you do.

**43:32**

Drew McLellan

I see it.

**43:33**

Marcus Sheridan

Chris, it's just me.

**43:36**

Chris Marr

Marcus. You'll have to just imagine what it looks like, if that's okay.

**43:39**

Marcus Sheridan

Yes.

**43:40**

Chris Marr

Yeah. So we've got three axis here, right? The top axis is like a high degree of self respect, self confidence. The lower axis is a high degree of need to be liked. And the axis across the middle is the degree of client respect.

**43:52**

Chris Marr

Okay?

**43:53**

Chris Marr

So what we found is that if you strive to be liked in your client work, you risk never being respected, ever. Okay? So your need to be liked is actually risking your ability to ever be respected. So we have to get things in the right order. We lead with the need to be respected with the chance of being liked later.

**44:14**

Chris Marr

Okay?

**44:15**

Chris Marr

Now this is all the insights that we learned. So that line that goes up the middle here is the journey that we're on. We're here from. We want to go from people pleaser to peer. We want to go from order taker to authority. Okay, you with me? People pleaser to peer, order taker to authority. That's the journey that we want to go on. What we need to recognize is where is your gap here in this journey? Okay, so let's look at that. One thing we figured out is, as we go on this journey, the level of respect that you receive from your clients can never be more than the respect that you have for yourself. So what that means is that a lot of the work that we're going to do together is about you.

**44:56**

Chris Marr

Is about you getting the skills, acquiring those skills, developing those skills, but actually turning that into true confidence so you can turn up and be a peer in any room with your clients. So it's an inner game, right? But when you're a people pleaser, this blue area here, you can see this label external. When you're a people pleaser, you change who you are based on the circumstances. You make assumptions about who you need to be in order to be liked. Now, we want to get out of that blue section as quickly as possible. Okay? What we've recognized through our work, Marcus. Together, right. Is that your need to be liked is not only holding you back from doing

your best work, but it's ultimately holding your clients back from getting the best results from the work that you're doing as well.

**45:42**

Chris Marr

Because as a people pleaser, what we do is we sweep things under the carpet. We don't say what needs to be said. We don't point out the mistakes, we don't point out the behaviors. And ultimately, we don't allow our clients to get unstuck and move forward. Where most of us end up here is in this friend zone, right? We're middling between authority and. And the need to be liked, and we want to break through that. We want to break through to authority. So we want to get into this orange zone here. How do we get you there? Well, it's about closing this gap, right? We want to close the imposter syndrome gap. This is all.

**46:12**

Chris Marr

This is exactly what today is about, is exactly what our program's about, is taking action in that space, giving you the tools, the frameworks, the talk tracks, the methods, everything that you need to step into this, that difficult conversation, that thing that you're avoiding saying, the thing that you're sweeping under the carpet. We want to move you through that. Okay? We call that the peer threshold. We're going to teach you how to.

**46:36**

Chris Marr

Overcome the peer threshold so you can.

**46:38**

Chris Marr

Go into any client situation, high stakes situations, and feel truly like a peer. The strength of your client relationships is directly related to the number of difficult conversations you're willing to have with your clients.

**46:54**

Chris Marr

Okay?

**46:54**

Chris Marr

So let's Do a quick poll, shall we? Marcus, is there a difficult conversation that you are currently avoiding with a client? Want to get a yes, no in the chat? Is there a difficult conversation that you are currently avoiding with a client? So we've got the half and a.

**47:12**

Chris Marr

Half here, I think. Interesting.

**47:16**

Chris Marr

Yes and no.

**47:17**

Marcus Sheridan

Yeah. Okay.

**47:18**

Marcus Sheridan

Hey, all right.

**47:19**

Marcus Sheridan

If it's truly half.

**47:20**

Marcus Sheridan  
All right.

**47:21**

Marcus Sheridan  
I respect those so much, saying, you.

**47:23**

Marcus Sheridan  
Know what, we have shared all the things. There's nothing I'm holding back with clients right now.

**47:29**

Marcus Sheridan  
All right, so that's certainly, that's certainly good. That's certainly good.

**47:33**

Drew McLellan  
Yeah.

**47:33**

Chris Marr  
Push us to the next slide, Marcus, real quick. So on this next slide here, the next. Could you give us to the next slide possible? Yeah. Here we go. So what we're going to do today, we've got a whole program that we're going to talk to you about later on in this workshop here, we're going to teach you four. Four things. First, though, high value, high impact things. Markus, what we're going to teach today is we're going to do a little bit of the top left there, right, Mastering the Pathfinder principles. We're going touch on this and then we're going to do a little bit of the practice in real scenarios on the right here. So I want to give you guys an idea that there's a whole thing here and we're going to show you a little bit of it.

**48:12**

Chris Marr  
So we're going to get into the four pillars of breakthrough communication.

**48:15**

Marcus Sheridan  
Let's get into the meat. This is what we love to teach. And we're going to introduce to you very briefly today four pillars of communication.

**48:25**

Marcus Sheridan  
That if followed, will change your life. And not just on a professional level, on a personal level.

**48:31**

Marcus Sheridan  
What's interesting about most communication frameworks, you'll find is that they apply just to.

**48:35**

Marcus Sheridan  
One specific group of people.

**48:37**

Marcus Sheridan  
And so if you're doing Sandler selling.

**48:39**

Marcus Sheridan  
Your leadership team isn't using Sandler, it's your sales team.

**48:43**

Marcus Sheridan

Whereas if you could have a communication framework, a system that applies across the entire organization, it can really change the entire culture. We're going to look at. Yes, and today, many of you have heard that before, but we're going to have a different lens, if you will, which essentially means build, don't break. It's all about energy and the energy we bring to every conversation, every meeting.

**49:03**

Marcus Sheridan  
We have with the client.

**49:04**

Marcus Sheridan  
We're going to look at vanguarding. That's the understanding of how to get in front of issues, prevent predictable problems. And there's always these predictable problems that could occur if we don't get in front of them as AMs. Then we're going to talk about question first. How to use questions so effectively that you never flinch again, that you never get stumped, that you never have a situation where you say to yourself, gee, I wish I would have known to say that with the client in that moment. I wish I hadn't just flamed out when the stakes were so high. I wish I would have known what to ask. Well, we're going to help you to start to see and catch that vision and that skill set today. And then finally, Law 3. Law 3 is so beautiful because this.

**49:44**

Marcus Sheridan  
Is where you make the deepest of connections.

**49:46**

Marcus Sheridan  
To get to the core, though, of the problem, you got to ask more. And we're going to teach you how to start thinking in the form of a question and asking a lot more. Okay, so. Yes, and let's start with that one here.

**49:58**

Marcus Sheridan  
Yes.

**49:59**

Marcus Sheridan  
And many of you have heard of it from the world of improv. In the world of improv, you put a couple of actors on stage, and the whole idea is that in order for them to take that scenario which is given to them oftentimes by the audience, for them to be effective, they must say yes. And now that is sufficient in the improv world. But we're gonna. We're gonna add more to that, because.

**50:22**

Marcus Sheridan  
A lot of times people think yes.

**50:23**

Marcus Sheridan  
And is a verbal thing.

**50:25**

Marcus Sheridan  
It's like we're saying yes and.

**50:27**

Marcus Sheridan  
But it's much more than that.

**50:29**

Marcus Sheridan  
Because it's the practice of receiving any.

**50:31**

Marcus Sheridan

Energy, good, bad or ugly, and transforming it into forward momentum. That builds progress rather than derailing progress. All right, so if you are constantly feeling like we're getting thrown off or I'm getting thrown off, when distractions appear.

**50:54**

Marcus Sheridan

I feel like I just.

**50:55**

Marcus Sheridan

I have those moments where when I. The client says something, I just don't know how to deal with it. I've got that flinch thing going on. Well, then you gotta learn yes. And so what we're gonna do is we're gonna play a little game here, which is the yes and response. What is the yes and response? We're gonna give you a scenario, and.

**51:14**

Marcus Sheridan

Your job is to say, what could.

**51:17**

Marcus Sheridan

You do in this moment so as.

**51:19**

Marcus Sheridan

To not allow the situation to cause.

**51:23**

Marcus Sheridan

A lack of momentum or losing momentum instead of. It allows you to continue to build in a forward direction. Now, my friend Drew, I'm going to.

**51:31**

Marcus Sheridan

Ask you to call to give me.

**51:33**

Marcus Sheridan

A couple names here, if you would.

**51:35**

Marcus Sheridan

All right?

**51:35**

Marcus Sheridan

A couple names, if you would.

**51:37**

Marcus Sheridan

And we're going to use probably three.

**51:39**

Marcus Sheridan

People here as my guess. Three or four people. All right. You got the first one here for me, Drew?

**51:42**

Drew McLellan

I do. Let's try Jen Newman.

**51:44**

Marcus Sheridan  
Jen Newman. Oh, Jen.

**51:47**

Jen Neumann  
Damn it, Drew.

**51:48**

Marcus Sheridan  
You knew. You're welcome, Jen.

**51:50**

Marcus Sheridan  
You.

**51:51**

Marcus Sheridan  
You just had that feeling like you.

**51:53**

Marcus Sheridan  
Had that sixth sense.

**51:53**

Marcus Sheridan  
All right, Jen, so we're going to.

**51:55**

Marcus Sheridan  
Play the what is the yes and response. And we're doing this because if we can do this now, it just gets.

**51:59**

Marcus Sheridan  
So much easier when we face it in real life. And I know you're a pro at this, Jen, and so there is no, like, wrong answer here. I'm going to present to you the scenario, and you tell me how we could deal with it. Sound good to you, Jen?

**52:11**

Marcus Sheridan  
Sure.

**52:12**

Marcus Sheridan  
Here we go.

**52:13**

Marcus Sheridan  
Here we go.

**52:13**

Marcus Sheridan  
So the first one is, Jen, the client can't get their camera turned on for the session. Now, listen, I know we're five years past Covid now, roughly, but sometimes this is still an issue. What could you do to not allow this to deter the energy of the moment?

**52:34**

Marcus Sheridan  
Sure.

**52:35**

Jen Neumann

Do you want me to respond to the client, or do you want me to just tell you what I do?

**52:39**

Marcus Sheridan

Yeah, just. Just tell us right now.

**52:40**

Marcus Sheridan

It's not an actual role play.

**52:42**

Marcus Sheridan

It's just.

**52:43**

Marcus Sheridan

We're just analyzing the scenario. So how would you. How would you handle this in real life? What are some options?

**52:48**

Marcus Sheridan

Sure.

**52:49**

Jen Neumann

I take the pressure off of them and let the. As long as they could hear me, I'd say, let's make sure you can see my screen, and we'll keep moving forward, and there's no pressure to get your camera on right at this moment. Join when you can with your. With your camera.

**53:03**

Marcus Sheridan

Yeah.

**53:04**

Marcus Sheridan

Cool.

**53:05**

Marcus Sheridan

We can absolutely do that. Let's look at it another way, and I'm going to challenge you even further here. And what you said was absolutely accurate.

**53:13**

Marcus Sheridan

We can do that.

**53:14**

Marcus Sheridan

What if we really need them to turn their camera on? How do we do it in such a way that it doesn't cause them to feel, let's say, embarrassment, but at the same time they turn it on?

**53:28**

Jen Neumann

So are you saying they. They. They are unsure technologically how to get their camera on?

**53:33**

Marcus Sheridan  
Yeah, they don't necessarily know.

**53:35**  
Marcus Sheridan  
Sure.

**53:35**  
Jen Neumann  
So I would walk through some troubleshooting steps and see if we can get that on. And if they really can't get the camera on, I would probably ask if we could reschedule.

**53:43**  
Marcus Sheridan  
Yeah, there you go.

**53:44**  
Marcus Sheridan  
So it could be something like, let's say you were the. The client in this case, Jen, it could be, like, I might say to.

**53:49**  
Marcus Sheridan  
You, it's no problem that you can't.

**53:51**  
Marcus Sheridan  
Figure this out, because this is one of those things I love doing, helping.

**53:54**  
Marcus Sheridan  
Folks just like you figure out how.

**53:56**  
Marcus Sheridan  
To turn their camera on for the first time. This is going to be fun. I really.

**53:59**  
Marcus Sheridan  
I really love this.

**54:00**  
Marcus Sheridan  
And then we're going to explain it. Now, some of you might say, well, that example never really happens. It's the principle that we're looking at, not at the example right now. It's not so much the scenario. Jen, that was awesome. I appreciate you very much. Drew, who's another person that we could bring up for the next one?

**54:15**  
Drew McLellan  
Here, try Eric Martinez.

**54:19**  
Marcus Sheridan  
All right, Eric Martinez. All right, Eric, are you with me?

**54:23**  
Erik Martinez  
I am right here.

**54:25**

Marcus Sheridan

All right, Eric. Looking good today. Looking good today, Eric.

**54:28**

Marcus Sheridan

All right, so a client stakeholder joins the meeting 12 minutes late.

**54:34**

Marcus Sheridan

All right, now, what would be your.

**54:37**

Marcus Sheridan

Exact words that you could use after they're joining 12 minutes late?

**54:45**

Erik Martinez

My exact words after 12 minutes late.

**54:48**

Marcus Sheridan

Exact words.

**54:51**

Erik Martinez

Generally, if we're already. If we're ready in the process, we stop, acknowledge them, welcome them to the meeting, and then we will do a quick recap just to catch them up.

**55:02**

Marcus Sheridan

Yeah, quick recap. All right, so.

**55:04**

Marcus Sheridan

So it might sound. So it might sound something like.

**55:10**

Chris Marr

You can use me.

**55:11**

Marcus Sheridan

I'm the client. I'm the client here.

**55:13**

Erik Martinez

Hey, Marcus, thanks for. Thanks for making it to the meeting. We were just talking about these handful of things.

**55:22**

Marcus Sheridan

Yeah, yeah, exactly. Eric, man, I'm so glad you're here. Here's what we've talked about up to.

**55:29**

Marcus Sheridan

This point in the meeting. Here's where we're going to go with this meeting. Here's the goal of today's meeting. Do you have any questions before continue. Super, super crisp. It doesn't slow it down. Or the other option is we just might say, hey, Eric, and then we just keep moving. There's different options, but what we don't do is we definitely don't, during those previous 12 minutes, not carry on with value, or we don't wait too long to start bringing the value, which is very common. Mara, did you have any comments about this one here?

**56:01**

Marcus Sheridan  
Really quick?

**56:03**

Chris Marr  
Yeah, I mean, we don't get into the reasons why they're late. Right. That's the negative space. That's us, like, doing the opposite of.

**56:09**

Marcus Sheridan  
That's. That's.

**56:10**

Chris Marr  
Yeah, but instead of yes and yeah, but is why are you late? And we're in that negative space, we want to just move the conversation forward.

**56:18**

Marcus Sheridan  
Right?

**56:18**

Marcus Sheridan  
Because it doesn't matter at this point because they are here.

**56:21**

Marcus Sheridan  
Even if they try to explain it's immediate.

**56:23**

Marcus Sheridan  
Hey, no worries.

**56:24**

Marcus Sheridan  
Yeah, we don't need it. We're rocking and rolling.

**56:26**

Marcus Sheridan  
We're having a good time.

**56:27**

Marcus Sheridan  
Great stuff, Eric. Appreciate you, bud. Let's do another one here. Drew, we got another person here.

**56:32**

Drew McLellan  
How about Laura Williams?

**56:34**

Marcus Sheridan  
Laura Williams. All right, Laura, I know you were asking to participate, so we have granted your wish. Laura. Laura, you. You can't get a dashboard. You can't get a dashboard to load.

**56:48**

Marcus Sheridan  
During a live session.

**56:50**

Marcus Sheridan

Has that ever happened to you, by the way? Laura can't get. It has happened.

**56:53**

de Novo

Yes.

**56:55**

Marcus Sheridan

So we can't get the dashboard to load. What could you do?

**56:59**

Marcus Sheridan

What could you say?

**56:59**

Marcus Sheridan

There's.

**57:00**

Marcus Sheridan

Look, there's many different ways that we could handle this, but how could you handle this without it deterring from the moment?

**57:06**

Marcus Sheridan

Sure.

**57:06**

de Novo

I'd say. Hey, Marcus. Oh, looks like we're having some technical difficulties here and getting this dashboard to load.

**57:13**

Marcus Sheridan

Good thing.

**57:13**

de Novo

We got some screenshots here in our meeting notes. We'll refer to that. And if we have any future questions that need to be done live, then I'll be happy to send a follow up video.

**57:22**

Marcus Sheridan

Yeah, I love how you.

**57:23**

Marcus Sheridan

How you talked about, here's what we're going to do. So you gave a solution in the real time and. And you talked about the future as well. You've pretty much just like covered it all in one, like, full swoop, which is really powerful. The whole key is that they don't see to your point because you really have a good energy about the way.

**57:42**

Marcus Sheridan

You speak their lord.

**57:44**

Marcus Sheridan

The whole key is that they don't sense there's a problem and that therefore we're going to lose something because we can't get this particular technology to. To work today. They need to feel like, oh, you've been expecting it not to work. And in fact, you were completely and fully prepared, so you nailed that one, Laura. Good job, girl.

**58:04**

Marcus Sheridan

You got that.

**58:05**

Drew McLellan

You got that, girl.

**58:06**

Marcus Sheridan

All right, so I appreciate you. One more.

**58:08**

Marcus Sheridan

Let's just do one more.

**58:10**

Marcus Sheridan

And this is always the challenging one.

**58:12**

Marcus Sheridan

Drew, we got one more person out there.

**58:14**

Drew McLellan

Oh, it's a challenging one. Oh, okay. Then I'm gonna pick Alex Nickdell.

**58:18**

Marcus Sheridan

Alex. Alex. Alex. Drew told me he was going to.

**58:21**

Marcus Sheridan

Pick on you before the event, and so you have.

**58:24**

Drew McLellan

I did not.

**58:27**

Marcus Sheridan

Officially made it to the call. You ready for this one, buddy?

**58:31**

Drew McLellan

Sure.

**58:31**

Marcus Sheridan

Okay, good. So, Alex, you're.

**58:33**

Marcus Sheridan

And I know this has never happened to you before, Alex, but it happens on occasion. All right, you're in a client session and someone gives answer, like somebody, your client gives answer that literally makes no sense whatsoever. All right, now, how do you handle that? Because the key to this, Alex, is we don't want to make the person that answered feel stupid for the answer. Right. And part of yes and part of energy is always making someone, especially the entire group. If you have a group of people on a call, inviting everyone to participate and making sure everyone is sharing. And then when they do share, you.

**59:10**

Marcus Sheridan

Got to make them feel good about their share.

**59:13**

Marcus Sheridan

That's the whole energy component to this.

**59:15**

Marcus Sheridan

So, Alex, what do we do about.

**59:16**

Marcus Sheridan

This one here, bud?

**59:20**

Alex Nikdel

I would try to do something that brings some energy to the room. So, hey, let's. Let's do a quick recap. What did you learn from the last couple of minutes?

**59:27**

Marcus Sheridan

Okay.

**59:28**

Drew McLellan

Okay.

**59:28**

Marcus Sheridan

You know, now how could we do it and stay with that person?

**59:32**

Alex Nikdel

Even an individual person, you mean?

**59:35**

Marcus Sheridan

Yeah.

**59:35**

Marcus Sheridan

So.

**59:35**

Marcus Sheridan

So somebody gave answer that made no sense. Right. Somebody gave answer that made no sense.

**59:40**

Marcus Sheridan

And you can't even. You can't.

**59:42**

Marcus Sheridan

There's no yes. And here. Because it's not even a yes because it didn't make sense.

**59:46**

Marcus Sheridan

How could you still make it a.

**59:47**

Marcus Sheridan

Win somehow for that person and for the moment, for. For the group? Again, there's no right or wrong answer here.

**59:53**

Drew McLellan

O.

**01:00:00**

Alex Nikdel

I'd probably validate their. Their opinion in some way, but try and try my best to put a pin in it.

**01:00:07**

Marcus Sheridan

Yeah.

**01:00:07**

Alex Nikdel

And move on.

**01:00:09**

Marcus Sheridan

Right. So we might say.

**01:00:10**

Marcus Sheridan

Okay, that's a perfect start.

**01:00:11**

Marcus Sheridan

All right, Alex, thanks so much for that. We could also sometimes, depending on the moment, we could repeat the question.

**01:00:18**

Marcus Sheridan

Okay, I like where you're going with this, Alex.

**01:00:20**

Marcus Sheridan

And then I'm going to repeat the question again. And now you have a further chance to really hear it better, potentially answer it better this time. But go ahead, Alex.

**01:00:30**

Alex Nikdel

Well, I was going to say. Or something along the lines of, like, let me understand what you mean by that.

**01:00:35**

Marcus Sheridan

Yeah.

**01:00:35**

Marcus Sheridan  
Okay.

**01:00:35**

Marcus Sheridan  
Or we might just, again, depending on the answer and how out of left field it is, we might say, let me make sure I understand exactly what you mean by that. Now, one of the things about this, though, everyone. And you can see this when I'm talking to you, one of the core components of yes and is what does your face say? And this is when we start working with ams and they start seeing themselves on client calls. One of the biggest comments we hear is, I didn't realize I look so grumpy. And we don't realize this until we actually start to observe. So it's not just the verbal much.

**01:01:13**

Marcus Sheridan  
Of it is what does all of.

**01:01:15**

Marcus Sheridan  
This say to the person? Does the person feel like this is going in the right direction or the wrong direction? Alex, really great stuff and I.

**01:01:23**

Marcus Sheridan  
Appreciate you jumping in with this.

**01:01:25**

Marcus Sheridan  
Okay.

**01:01:26**

Marcus Sheridan  
The bottom line with yes and is always moving forward. Any final thoughts on this one, Mar? Before we move to the next pillar?

**01:01:35**

Chris Marr  
I think the only thing here is like where we tend to get stuck and when we think about yes and what we're trying to. The gap here that we're trying to close is not getting stuck in the negative stuff. Like when there's resistance pushback. We don't want to start a debate of opinions. And that's as stuck in the. In the past and stuck in that sort of. Yeah, but space. Just think about this big arrow that's moving the commerce. You're that arrow driving the conversation forward with the right energy. And to your last point there, I think there's a lot you can get away with a great smile on your face. Right. So if you're smiling and even if the thing you're saying is like a negative, like whatever it is, it's like really critical feedback or whatever.

**01:02:16**

Chris Marr  
If you've got like a smile on your face and you have that intention that you want them to be successful, it's amazing how that just can disarm and move the conversation towards where it needs to go.

**01:02:27**

Marcus Sheridan  
Awesome. All right, let's move on. Now let's talk about vanguarding. This is one you haven't necessarily heard of before, but you understand the principle, which is essentially being very proactive. Vanguarding is the practice of foreseeing what could go wrong, being hyper aware of potential concerns and resolving them up front to prevent to disengagement, failure or distraction. The greatest way in life to resolve a concern is to address it before.

**01:02:50**

Marcus Sheridan  
It becomes a concern.

**01:02:51**

Marcus Sheridan

The word vanguard comes from originally the Roman army. The vanguard unit was the first to go into battle. And when they went into battle, they formed a V. They were the tip of the spear, so they helped solve the problem first. So when we vanguard well, we get in front of issues. What we see over and over again. When there are issues with clients, almost always they start with poor communication and. And almost always they start with a missed vanguard. And so we're going to talk now.

**01:03:18**

Marcus Sheridan

About just vanguarding in general.

**01:03:20**

Marcus Sheridan

In fact, today we even used some vanguards. You may or may not have picked it up. Can anybody, if you can in Chat. What was something we did today when we started even to potentially get in front of any issues we might have? It's important that you almost notice these things because there's going to be vanguards that you always do when you with clients. So what's an example of a vanguard that we may have implemented today, now that you're looking back on how we started the conversation, because there was a couple different vanguards at the beginning. Mar anything coming through so far?

**01:03:56**

Chris Marr

Well, the first one that came out was role playing. We talked about role playing and why it's important.

**01:04:01**

Marcus Sheridan

The reason why we vanguarded that is because we know people as a whole hate role playing and they say it doesn't work. And that's because they've never done real role plays consistently. So we know, because there's going to be some doubt about that, we're going to address that doubt head on before you have a chance to even think, I hate role plays. At least we're going to say it for you beforehand. What else?

**01:04:21**

Marcus Sheridan

More.

**01:04:22**

Chris Marr

Well, here's a really interesting one, is block M is that we're going to call on you.

**01:04:28**

Marcus Sheridan

Yes.

**01:04:29**

Chris Marr

Yes.

**01:04:29**

Marcus Sheridan

All right.

**01:04:30**

Chris Marr

Perfect.

**01:04:30**

Marcus Sheridan  
So there's no dead space.

**01:04:32**

Marcus Sheridan  
Great observation.

**01:04:33**

Marcus Sheridan  
Whoever made that.

**01:04:34**

Marcus Sheridan  
Who made. Who was that? That was really.

**01:04:38**

Chris Marr  
Yeah, Alluvial.

**01:04:39**

Marcus Sheridan  
Okay.

**01:04:39**

Marcus Sheridan  
That was a pronoun observation. That's a classic example of a vanguard.

**01:04:44**

Marcus Sheridan  
So we know I am vanguarding right.

**01:04:46**

Marcus Sheridan  
Now because I don't have. I don't have the ability to look at all the chat and all this stuff. So you notice Chris is looking at the chat. He's handling that. That's a vanguard. Drew has the responsibility to call on people. That's a vanguard. He is letting you know that it's coming. That's a vanguard. He's calling for me. That's a vanguard that makes everything go quickly. This allows you to be more efficient in your meetings than you could ever before. Everyone has had awkward silence in meetings before. Notice how our flow for this is much faster as we're working through people, because we're not saying, does anybody have answer? For the only time we're having a group thing is when we're saying, go ahead and put this in chat.

**01:05:23**

Marcus Sheridan  
But when we ask a question, and this is a vanguard technique so that.

**01:05:27**

Marcus Sheridan  
You have consistent flow of energy, is you always ask questions to individuals. And when you ask questions to individuals, there's no gap. And this also ensures way more people participate in the meeting. So it's very important when you're dealing with multiple stakeholders. Anything else, Chris? That came up on that.

**01:05:45**

Chris Marr  
Yeah. There's one more here I think it's worth. And it was Eric that came up with that one. I got the name wrong. It talked about how not everyone might agree with the data, but pointing at the common ground to keep us on a united front.

**01:05:57**

Marcus Sheridan  
Another smart.

**01:05:59**

Marcus Sheridan

That was so good. Yeah, right.

**01:06:00**

Marcus Sheridan

Because I know there's some people that.

**01:06:02**

Marcus Sheridan

Are going to see that stat about.

**01:06:04**

Marcus Sheridan

Okay, here's the AI impact on SEO services. Some people are going to say, I think it's way higher. Some people are going to say, I think it's way lower. So what's the common ground? The common ground is we all pretty much agree that it's going to affect us to a degree. We just don't know how much. And so therefore, we need to start to replace those traditional services with some newer, more progressive services that. That the agency of the future should be offering again, in our opinion.

**01:06:29**

Marcus Sheridan

Great observations.

**01:06:30**

Marcus Sheridan

Those were all vanguards. Now, we want to teach you before we do that, okay, what's the clearest sign in your client work that you don't have the authority or influence that you need to do your best work? All right, so client doesn't respect you from the beginning of the relationship. What's the solution? The solution is, in this case, the honest agreement. We want to teach you now how you can immediately generate a mountain of respect and authority at the beginning with the client. And if you learn this, and this is something that doesn't happen in a day, but if you learn this with practice, you'll see it's very transformational to your relationships. You can use what's called the honest agreement again and again. And we're going to show you exactly how this works, all right, the honest agreement.

**01:07:19**

Marcus Sheridan

And specifically, we're going to use it for client kickoff meetings. Now, there are steps to this, and we're going to show you the full.

**01:07:28**

Marcus Sheridan

Script here in a minute.

**01:07:29**

Marcus Sheridan

But I just want to show you the steps. When you have an honest agreement with anyone, again, you can. Your sales team can do this. And by the way, we teach sales teams to always start with an honest agreement at the very beginning of the relationship with the potential client. Now, once you have your kickoff with the client, we're going to do another honest agreement. So it talks about the importance and the purpose of the conversation or the meeting that day.

**01:07:51**

Marcus Sheridan

Like, what's the goal here?

**01:07:52**

Marcus Sheridan

What's the big goal? We tell them our commitment to them. We let them know we're going to.

**01:07:58**

Marcus Sheridan

Ask a lot of questions that they're.

**01:08:00**

Marcus Sheridan

Not necessarily used to deeper questions that really push them to think.

**01:08:05**

Marcus Sheridan

We also get their commitment to be.

**01:08:07**

Marcus Sheridan

Open and honest with us.

**01:08:08**

Marcus Sheridan

With us.

**01:08:09**

Marcus Sheridan

And we get a verbal agreement at the end.

**01:08:12**

Marcus Sheridan

Now, right now, that might not make a lot of sense to you.

**01:08:14**

Marcus Sheridan

I'm going to show you how that works. I'm going to show it live.

**01:08:16**

Marcus Sheridan

Drew, if you could just choose one.

**01:08:18**

Marcus Sheridan

Person, they're going to be the receiver here. They're not going to have a hard job. All right, so can we choose one person to be the customer here? The client?

**01:08:27**

Drew McLellan

Yeah.

**01:08:27**

Drew McLellan

Kim Jones.

**01:08:28**

Marcus Sheridan

Kim Jones. Kim, go to yourself. Kim, how are you doing today?

**01:08:36**

Drew McLellan

Oh.

**01:08:38**

Drew McLellan

Maybe Kim had to drop off. Okay. Her business partner. Brad.

**01:08:42**

Marcus Sheridan

Brad. All right, Brad, are you with me, brother?

**01:08:47**

bradgillum

I'm here, but boy, Kim.

**01:08:50**

Marcus Sheridan

All right, Brad, you are not in trouble.

**01:08:53**

Marcus Sheridan

You are not in trouble at all.

**01:08:54**

Marcus Sheridan

All right.

**01:08:55**

bradgillum

Kim is in trouble.

**01:08:56**

Marcus Sheridan

Oh, Kim is in trouble.

**01:08:57**

Marcus Sheridan

That's right. Because she tossed it off to you. Okay, so, Brad, this is. We're going to pretend that this is the first. This is a kickoff meeting.

**01:09:04**

Marcus Sheridan

I.

**01:09:05**

Marcus Sheridan

For us, for this relationship. What type of relationship is this going to be? Is this going to be paid services? SEO services? Which one is it?

**01:09:11**

Marcus Sheridan

You tell me.

**01:09:13**

bradgillum

Branding.

**01:09:14**

Marcus Sheridan

Branding. Oh, I like it.

**01:09:15**

Marcus Sheridan

Let's do branding.

**01:09:16**

Marcus Sheridan  
All right, here we go.

**01:09:17**

Marcus Sheridan  
And I just want you to just act like you normally would.

**01:09:20**

Marcus Sheridan  
All right?

**01:09:20**

Drew McLellan  
Right.

**01:09:21**

Marcus Sheridan  
By the way, I've never done it.

**01:09:23**

Marcus Sheridan  
For branding before, so this is fun for me to do it in real time. And you can see if I did this five times, it would sound a little bit differently each time, but it's essentially going to follow those five things.

**01:09:32**

Marcus Sheridan  
That you're looking at on the screen.

**01:09:34**

Marcus Sheridan  
Brad, I am so excited that we get a chance today to talk about the future of your brand and what that means for your organization, as you said to me. And of course, as we feel this is an incredibly important meeting because it's going to affect us for years to come now, because this is so important. Here's my commitment to.

**01:09:57**

Marcus Sheridan  
To you.

**01:09:58**

Marcus Sheridan  
As we go through this process and as we get to know each other and as we're always looking at things, I am always going to be very open, honest, and candid with you. I feel like you deserve that, and I'm not going to hold anything back. And along with that, I'm going to ask you some questions that I'm sure no one has ever asked you before. And the reason why I'm going to ask you those questions is. Is because if we push through them and figure them out, Then we're going to have some breakthroughs. Is that fair with you, Brad?

**01:10:28**

bradgillum  
Yeah, absolutely.

**01:10:29**

Marcus Sheridan  
Awesome.

**01:10:30**

Marcus Sheridan  
Awesome.

**01:10:30**

Marcus Sheridan

Now, at the same time, this is really important. You have to be open, honest and transparent with me. Listen, there's going to be things that I show you during this branding process that you're not going to like.

**01:10:42**

Marcus Sheridan

You're literally going to look at it.

**01:10:43**

Marcus Sheridan

You're going to say, I don't like that. Now, when you see that thing, Brad, and you don't like it, what do you need to say?

**01:10:49**

bradgillum

Well, I'm going to tell you I don't like it.

**01:10:51**

Marcus Sheridan

That's right. You need to tell me you don't like it. Because if you don't tell me you.

**01:10:54**

Marcus Sheridan

Don't like it, what happens?

**01:10:57**

bradgillum

Well, if I don't like it, then you know, we're going to have a discussion as to why I don't like it and where we go from there.

**01:11:02**

Marcus Sheridan

Yes.

**01:11:03**

Marcus Sheridan

So you telling me you don't like something, is that a good or a bad thing?

**01:11:07**

bradgillum

Well, it depends. Before we get to that, Marcus, are we going to do some research to determine whether it's something that we all know and have grounded information on before we discuss whether it's something I like or you like? Because it doesn't matter whether you or I like it. It depends on whether.

**01:11:26**

Marcus Sheridan

Now you're sounding. Now, now you're sounding like an agency owner. Yes, yes, we, of course, we of.

**01:11:31**

Marcus Sheridan

Course would do that. But the point here is. The point here is, can when you don't like something, will you commit to always letting me know?

**01:11:41**

bradgillum

Yes, absolutely.

**01:11:42**

Marcus Sheridan  
Great.

**01:11:42**

Marcus Sheridan  
And if we do that, I'm sure we're going to have an exceptional experience.

**01:11:47**

Marcus Sheridan  
Okay, good.

**01:11:48**

Marcus Sheridan  
Now, Brad, with that being said, if you start off in a relationship, a kickoff with someone like that. Right. In other words, if we kick off with that mutual agreement, that we're always going to be open and honest with each other about how we feel, what is the potential impact that it has on the relationship with versus if we don't?

**01:12:09**

bradgillum  
It can be a much better, well grounded relationship, one based on transparency and vulnerability.

**01:12:16**

Marcus Sheridan  
Yeah. And we want to advance to that place, to your point of transparency and vulnerability as quickly as possible. You know what's interesting? Lots of times clients are not honest with us, not for any other reason other than the fact that they just really like us and they know we put a lot of work in something like brand and because they don't want to hurt our feelings, they don't tell us they don't like it. And then what happens is ultimately they end up choosing someone else. And the whole time we said, but I thought it was so good. Now, a question for the group and Brad, thanks so much for your help there.

**01:12:55**

Marcus Sheridan  
All right, on a scale of 1 to 10, how well are you doing that type of honest agreement with clients at the beginning where it's very explicit and it's verbal, like we did with Brad? On a scale of 1 to 10 being Marcus, we actually do that.

**01:13:14**

Marcus Sheridan  
Much better than you. It's totally fine.

**01:13:16**

Marcus Sheridan  
Or one being. Yeah, we are totally not doing that very well. Because one thing that we want to understand is honesty should not be assumed. And too often in sales, we assume it. And then with the client relationship, we assume it. And the successful ones, the best ones, break through the assumptions and they quickly establish the trust because we say, hey, this is how it's going to be every single time. All right, so, Chris, what are some of the numbers that we're seeing or the average?

**01:13:48**

Chris Marr  
Yeah, man, we've got a solid range here. I'm going to say the average is probably a six or a seven, quite high. So people are doing this, and I think some people have mentioned here that they used to be terrible at it. So Sarah said we used to be terrible at it, but we've actually been working on it, and I'd say we're at a seven now. So people are seeing the impact of it. So those with low numbers should be looking at those with high numbers and thinking, how do we get there and make that impact? Yes.

**01:14:16**

Marcus Sheridan  
Yes. Good.

**01:14:17**

Marcus Sheridan

And what's great about this? Actually, let's just do a quick practice on this. Drew, could you call on someone now?

**01:14:23**

Marcus Sheridan

And.

**01:14:23**

Marcus Sheridan

And we're going to make it really easy on them.

**01:14:25**

Marcus Sheridan

All right?

**01:14:25**

Marcus Sheridan

We're going to.

**01:14:26**

Marcus Sheridan

We're going to. We're going to make it as easy as possible.

**01:14:28**

Marcus Sheridan

All right?

**01:14:29**

Drew McLellan

How about.

**01:14:29**

Drew McLellan

How about Leah Moore?

**01:14:31**

Marcus Sheridan

Leah?

**01:14:32**

Marcus Sheridan

All right. Did I say that right, Leah?

**01:14:33**

Drew McLellan

Yep.

**01:14:35**

Marcus Sheridan

Right.

**01:14:36**

Marcus Sheridan

How are you, Leah?

**01:14:37**

Leah Moore  
I'm fine. How are you?

**01:14:38**

Marcus Sheridan  
All right. I'm doing good. It's good to see you, Leah.

**01:14:41**

Marcus Sheridan  
So here's what's going to happen this time. You're going to be the account manager doing the kickoff, all right?

**01:14:47**

Marcus Sheridan  
We're going to keep this one pretty basic, and all I want you to.

**01:14:50**

Marcus Sheridan  
Do is just follow what you see on the screen. I'm going to move the screen for you, the slide to the next one, all right? And you can just. We're just going to practice what it would feel like, what it would sound.

**01:15:02**

Marcus Sheridan  
Like for you to say it this is you. Your first call with me.

**01:15:06**

Marcus Sheridan  
This is our kickoff call. And you could call it. This is SEO and paid services. How about that? We'll just call it SEO and paid services. Sound good?

**01:15:13**

Drew McLellan  
Sounds good.

**01:15:14**

Marcus Sheridan  
All right, you go ahead and fire away.

**01:15:17**

Leah Moore  
It's great to meet you, Marcus. I'm really looking forward to working with you and your team. I'm really excited about what we've got ahead of us and the results we can create together. Before we dive in too far, I do want to quickly set up how we'll work together so we can get off to the strongest possible start.

**01:15:34**

Drew McLellan  
All right? Yeah.

**01:15:35**

Leah Moore  
One of the most important things for us to be successful is open, honest, and direct communication. That means I'll always tell you what I really think, especially if I spot something that's off, if I'm unsure about a direction, or if I believe something could be improved. I'll never withhold something just to keep things smooth. I'll bring it up early so we can work through it together. Alongside that, you'll notice, I'll often ask questions that go a bit deeper than usual, questions that might challenge how things have been done before or push us both to think a little harder. And in those moments, the most productive thing you can do is lean in and work through them. Does that feel fair to you?

**01:16:10**

Marcus Sheridan  
Yeah, it feels totally fair to me. Yes.

**01:16:13**

Leah Moore

Okay, great. Now, on your side, I need the same honesty and directness from you. If I ever suggest something that doesn't sit right or if I just say something that feels off, will you tell me it won't hurt my feelings?

**01:16:25**

Marcus Sheridan

Yeah.

**01:16:25**

Marcus Sheridan

Yeah, I would do that.

**01:16:27**

Marcus Sheridan

Okay, great.

**01:16:29**

Leah Moore

So can I share an idea with you? Yeah, right now. And you? I'm sorry. I got lost on this.

**01:16:34**

Marcus Sheridan

That's right.

**01:16:35**

Marcus Sheridan

You can just start right from that first one. You're doing great.

**01:16:38**

Marcus Sheridan

In fact, let me ask, if I.

**01:16:39**

Leah Moore

Share an idea with you and you think it's the worst idea ever, or what should you say?

**01:16:43**

Marcus Sheridan

I should say, Leah, honestly, I think this is the worst idea ever.

**01:16:47**

Leah Moore

Exactly. Because if you don't tell me, I don't know.

**01:16:51**

Marcus Sheridan

That's right.

**01:16:54**

Leah Moore

So you can agree to be 100% open and honest and direct with me even when it's uncomfortable.

**01:16:58**

Marcus Sheridan

Yes, I will agree to do that.

**01:17:00**

Marcus Sheridan  
Everybody on the screen, give Leah a.

**01:17:02**

Marcus Sheridan  
Round of applause for being so dang awesome.

**01:17:04**

Marcus Sheridan  
All right, Now, Leah, I'm sure you're doing this to a degree, but just.

**01:17:07**

Marcus Sheridan  
Doing that like that, do you see an opportunity where you could potentially improve that initial honest agreement with clients?

**01:17:15**

Marcus Sheridan  
In the future.

**01:17:15**

Leah Moore  
Yeah. I mean, I think one of the big takeaways even in this is thinking about maybe scripting it a little better ahead of time. Right. To go in and do that because you can sort of anticipate what the back and forth is going to be. I doubt anybody's ever going to say no. I won't be honest with you. You'll find out later if they are or not. But having that ready to go would help make it smoother.

**01:17:34**

Marcus Sheridan  
Yeah. And the reason why, to this point.

**01:17:36**

Marcus Sheridan  
Everyone, for those that think, why is this not assumed? Because there's going to be times in the relationship where you're going to see that they're hedging, they're holding back and this is when you're going to say, do you remember when we said, hey, let's always be honest with each other?

**01:17:47**

Marcus Sheridan  
And they're going to say yes.

**01:17:48**

Marcus Sheridan  
I just feel like right now there's something that you're not telling me. Is that the case? And then now you're going to have a chance for a breakthrough. Leah, that was really great. Again, what would be the impact on your agency if you started every kickoff with an effective honest agreement? In fact, we had a, had recently a story that was pretty cool with this. Chris, you want to tell us about that?

**01:18:15**

Marcus Sheridan  
Yeah.

**01:18:16**

Chris Marr  
This is McCall. This is literally one week into our program. So this is one of the first things that we teach. And so what she did was she took the honest agreement, she took essentially the vanguard and the question first and put them together. And she was able to use the honest agreement in question first to understand where a client's sort of money issues were. They were essentially coming in to cancel their contract, Came in with question first and with the honest Agreement helped that client to realize that by canceling their contract wasn't going to

actually solve the root problem, came up with a game plan and ultimately retained the client. So this is like, this is the, this is how much of an impact the honest agreement can have. I always look at it, Mark, as like a snap.

**01:19:00**

Chris Marr

Like it snaps the relationship into a place where it needs to be so that you can both do your best work.

**01:19:05**

Marcus Sheridan

Great. And we again, you're going to refer back to elements of the honest agreement. Many times in the future you might do many honest agreements at the beginning of a 90 day kickoff or something like that.

**01:19:18**

Marcus Sheridan

Right.

**01:19:18**

Marcus Sheridan

It's like you're always going to reset just like any great mastermind group resets. So that's all about vanguarding, which is.

**01:19:27**

Marcus Sheridan

Proactively preventing predictable Problems, because we know we're going to have them.

**01:19:31**

Marcus Sheridan

Now, Chris just mentioned question first. This is just the. Really, the centerpiece of everything we believe. Question first. Is the practice of thinking, responding, and teaching through questions, creating moments of clarity.

**01:19:41**

Marcus Sheridan

Ownership, and transformation for others.

**01:19:44**

Marcus Sheridan

All right, so have you ever been hit with resistance before from a client? And you get flustered very quickly, and you feel like you're defending and you're losing your authority? Well, if that's the case with you, we have the perfect exercise. And when we teach this simple exercise, when we do this and train on this understanding, the pushback pivot will change your life. It will defuse so many potential negative moments. Okay, now, the key to the pushback pivot is when somebody says something to you negative, you repeat the negative phrase, and then you say, tell me more about that.

**01:20:26**

Marcus Sheridan

So it would be no different right.

**01:20:27**

Marcus Sheridan

Now than if Chris said to me, marcus, I hate your jacket. And I would say, hate my jacket. Please tell me more about that.

**01:20:35**

Marcus Sheridan

That's it? That's it.

**01:20:37**

Marcus Sheridan

I wouldn't say, well, what do you mean you don't like this jacket? I just say, you hate this jacket. Please tell me more about that.

**01:20:42**

Marcus Sheridan  
That's it.

**01:20:43**

Marcus Sheridan  
Okay, that is the pushback pivot. Now we're going to do this together. And again, this is one of those.

**01:20:49**

Marcus Sheridan  
Things where you might say to yourself.

**01:20:50**

Marcus Sheridan  
I don't understand this exercise. If you master this, you will never get caught up again when you get hit hard with that friction point. Drew, we're going to call on a few people here, so let's go ahead and have three people prepared.

**01:21:03**

Marcus Sheridan  
Go ahead and give me three names.

**01:21:04**

Marcus Sheridan  
And then I'll go in order.

**01:21:05**

Marcus Sheridan  
The three names that you give me.

**01:21:07**

Drew McLellan  
All right, Sarah Martin.

**01:21:09**

Marcus Sheridan  
Okay, we're gonna go. Sarah first.

**01:21:11**

Drew McLellan  
Rich Canova.

**01:21:12**

Marcus Sheridan  
Rich is going to be second, and Lori Hybe. All right, Lori's gonna be third.

**01:21:16**

Marcus Sheridan  
All right, Sarah, go ahead and unmute yourself. All right.

**01:21:20**

Sarah Martin  
Hi.

**01:21:21**

Marcus Sheridan  
Hey, Sarah, you are looking bright and shiny today. All right, so I'm gonna act like the.

**01:21:27**

Marcus Sheridan

I'm gonna act like the client here. Your job is to take the negative word of the sentence or words. It could be more than one.

**01:21:35**

Marcus Sheridan

Okay.

**01:21:35**

Marcus Sheridan

One or more. And then you repeat that just like I say it, and then you just have me tell you more. Okay, Got it. All right.

**01:21:42**

Marcus Sheridan

All right, we go. Sarah. Yeah. I got to be honest with you.

**01:21:45**

Marcus Sheridan

I'm just really super frustrated with the results so far.

**01:21:50**

Jen Neumann

Frustrated with the results so far. All right, can you tell me a little bit more about that?

**01:21:55**

Marcus Sheridan

Perfect.

**01:21:56**

Marcus Sheridan

So good.

**01:21:57**

Marcus Sheridan

Now, normally, Sarah, what do people want to do in this moment?

**01:22:02**

Marcus Sheridan

Defend yourself.

**01:22:03**

Marcus Sheridan

Defend. It's the most human thing.

**01:22:05**

Marcus Sheridan

We also like to say things like, well, you know, when I've been looking.

**01:22:09**

Marcus Sheridan

At the results and the issue with that is, has the person been heard and have they fully explained yet?

**01:22:16**

Marcus Sheridan

Right.

**01:22:16**

Marcus Sheridan

They haven't done it usually, no. All right. And so they have to say exactly what they are frustrated about because it.

**01:22:24**

Marcus Sheridan

Might be something that we're assuming. And if we assume here, we all know the old saying, it's going to be a mistake. So we don't want to make any assumptions.

**01:22:32**

Marcus Sheridan

All right, great one. Sarah, who was that second one that you called on? Drew.

**01:22:35**

Marcus Sheridan

Appreciate that, Sarah.

**01:22:36**

Drew McLellan

Rich. Cannabis.

**01:22:37**

Marcus Sheridan

All right, Rich, come on down. You're the next contestant.

**01:22:40**

Chris Marr

Hey, Marcus, how you doing?

**01:22:42**

Drew McLellan

I'm here.

**01:22:43**

Marcus Sheridan

All right, Rich. All right. So, Rich, here we go.

**01:22:47**

Marcus Sheridan

Rich, your schedule doesn't align perfectly with ours.

**01:22:55**

Chris Marr

Sorry to hear that our schedules don't align. Can you tell me a little bit more about why?

**01:22:59**

Marcus Sheridan

Okay, good. Now, good. Now here's what I want you to do.

**01:23:01**

Marcus Sheridan

This time, I want you to only take the negative part of the sentence without any additional words and just have me tell you more.

**01:23:10**

Marcus Sheridan

Okay, I'm going to say it again.

**01:23:11**

Marcus Sheridan  
And then you go come back. Okay.

**01:23:13**  
Marcus Sheridan  
Hey, Rich. Yeah?

**01:23:15**  
Marcus Sheridan  
I mean, my issue is I just don't think your schedule doesn't align perfectly with ours.

**01:23:23**  
Chris Marr  
Oh, so your schedule doesn't align with mine. Can you tell me a little bit more about that?

**01:23:27**  
Marcus Sheridan  
Yes.

**01:23:27**  
Marcus Sheridan  
Good, good.

**01:23:29**  
Marcus Sheridan  
Doesn't align. Tell me more. You can literally, here's something that's. That's.

**01:23:35**  
Marcus Sheridan  
We.

**01:23:36**  
Marcus Sheridan  
We work so much on with AMs and with leaders too, but the shorter the question, everyone, the more effective the question and the greater your authority. And this is something that's really hard.

**01:23:47**  
Marcus Sheridan  
For people to understand.

**01:23:48**  
Marcus Sheridan  
We want to add words to questions. You actually want to shorten your questions. And so by saying doesn't align, please tell me more is actually more powerful than extending that question out.

**01:24:02**  
Marcus Sheridan  
Does that make go that short?

**01:24:03**  
Drew McLellan  
Like, go. Yes.

**01:24:05**  
Alex Nikdel  
So we.

**01:24:06**  
Chris Marr  
We don't align. Tell me more.

**01:24:07**

Marcus Sheridan  
Like.

**01:24:08**

Marcus Sheridan  
Yeah, it doesn't line. Tell me more. But with that smile that says, everything is okay with what you're saying right now, because we don't want them to feel like this is a rough moment. We actually want them to feel like, I thought that was going to be hard. And geez, Rich made it really dang easy. Kind of like that Rich guy, right, Rich? Awesome job.

**01:24:25**

Marcus Sheridan  
All right, one more person. Who was that last person there?

**01:24:28**

Kelsey McLellan  
Drew Lori.

**01:24:29**

Drew McLellan  
Hybe.

**01:24:30**

Marcus Sheridan  
All right, Laura.

**01:24:31**

Drew McLellan  
Howdy, Lori.

**01:24:33**

Marcus Sheridan  
Lori. Hey, Lori. All right.

**01:24:36**

Marcus Sheridan  
I like the words in the background there. That's looking kind of cool.

**01:24:39**

Marcus Sheridan  
All right. Yeah. So, Lori, I mean, I gotta be honest. Your co worker the other day gave.

**01:24:46**

Marcus Sheridan  
Us the opposite advice.

**01:24:49**

Kelsey McLellan  
Oh, co worker gave us.

**01:24:51**

Jen Neumann  
Gave you the opposite advice. Can you tell me more about that?

**01:24:53**

Marcus Sheridan  
Okay, good. Now, I want you to short it.

**01:24:54**

Marcus Sheridan

And just find the negative words here, like the core issue of the sentence.

**01:25:00**

Marcus Sheridan

What are the negative words here?

**01:25:03**

Marcus Sheridan

You received opposite advice. Can you tell me?

**01:25:06**

Marcus Sheridan

Opposite advice. That's what it is. That's it.

**01:25:08**

Marcus Sheridan

All it is. Opposite advice. That's the negative phrase. All right, so we're going to do it again, and this time just use those.

**01:25:14**

Marcus Sheridan

And the key is sometimes people want.

**01:25:17**

Marcus Sheridan

To use their own words when dealing with the resistance. You don't want to use your own words. You actually want to use the person's.

**01:25:23**

Marcus Sheridan

Words exactly as they said it.

**01:25:26**

Marcus Sheridan

And now you're going to be dramatically more effective, and they're going to resolve that much more with you. Okay, so we're going to do it again. Laurie, you're doing great.

**01:25:32**

Marcus Sheridan

Yeah, Lori, I got to be honest with you.

**01:25:35**

Marcus Sheridan

Your coworker the other day gave us the opposite advice.

**01:25:39**

Marcus Sheridan

Opposite advice. Can you tell me more about that?

**01:25:42**

Marcus Sheridan

Yes. You go, Lori, you go. You go. Now, by the way, everyone, we have.

**01:25:49**

Marcus Sheridan

To do this in the right context, but the pushback pivot, you can use it in any moment for your sales team. It is so powerful because if someone.

**01:25:58**

Marcus Sheridan

Says to you, I feel like you.

**01:26:00**

Marcus Sheridan

All are so much more expensive instead of defending, it should literally be expensive. Please tell me more about that.

**01:26:06**

Marcus Sheridan

I don't feel like you can offer.

**01:26:07**

Marcus Sheridan

What the other ones are offering me. We can't offer those things. Please tell me what we can't offer.

**01:26:13**

Marcus Sheridan

Someone says to you, I just don't.

**01:26:15**

Marcus Sheridan

Feel like we're the best fit. Not a fit. Please tell me more. But you notice the face matches the energy, and almost like we're expecting them to ask the question. If you practice this again and again, you're going to see you're always going to be to resolve these issues. All right, now, this is the pushback pivot.

**01:26:35**

Marcus Sheridan

What we just saw there is having.

**01:26:37**

Marcus Sheridan

The perfect energy face, hands, body. When we're hit with something, we repeat the negative phrase and then we say, tell me more. And by doing that, you're going to disarm a huge number of issues. And by the way, yes, this does work in your personal life. Last thing I'll say about this. Okay?

**01:26:57**

Drew McLellan

And with employees, Marcus, a hundred percent.

**01:26:59**

Marcus Sheridan

Of the time someone says to you.

**01:27:01**

Marcus Sheridan

I think I deserve a raise.

**01:27:02**

Marcus Sheridan

You say, a raise? Please tell me more about that.

**01:27:06**

Marcus Sheridan

That's it.

**01:27:07**

Marcus Sheridan

But don't add more to it. And now the person does the work in this one activity. When someone masters it, I'm telling you, game changer. Mar any just quick comments on the pushback pivot? Cause you've been teaching it to a ton of clients. Clients recently.

**01:27:24**

Marcus Sheridan  
Yeah.

**01:27:24**

Chris Marr  
This is like a magic trick. It's like pulling a rabbit out of a hat, I think. Because what you do is you literally take the resistance that you're getting from somebody, like they're coming ready to fight you almost. And then all of a sudden they're having to talk through their own resistance. So I think that quite. It's awesome to see it actually play out. Right. Most account managers get stuck here though, and I think we've seen it in the practice there. It's like we naturally want to say more. We actually think that authority comes from talking a lot like telling, explaining, having insights, opinions. But when it comes to question first and overcoming resistance and misunderstanding and pushback, the less we speak the better. And we actually lead with question first instead.

**01:28:08**

Chris Marr  
Right.

**01:28:08**

Chris Marr  
So that's the transition that we want to make.

**01:28:12**

Drew McLellan  
Yeah.

**01:28:13**

Marcus Sheridan  
So good.

**01:28:13**

Marcus Sheridan  
Thank you for that. So bottom line, question first is ask, don't tell. Especially when you get hit with resistance. Yes, there's times that you tell, there's times that you're going to give a direct strategy, direct advice, but there's also times, especially when you're hit with friction, that if you start with that question, you will disarm the situation and you're going to resolve it and you're going to say, man, that was so effective.

**01:28:39**

Marcus Sheridan  
The final one.

**01:28:40**

Marcus Sheridan  
And we're just going to spend just a minute or two on this and then we're going to put it all together. Is the law of three. Now, the law of three is the practice of breaking through surface level responses, which there's so many. I mean, you see so many. Knowing that the real understanding is achieved only by asking successive thoughtful questions, creating transformative moments of clarity and self discovery. We see over and over again that there's this huge problem within the agency client relationship of superficial surface level conversation. Whereas we want to have more depth. Now, how do you know you've created a light bulb moment? You see, if you ask great questions and if you use the law of three, what's going to happen is you're oftentimes going to have the person, the client you're talking to say things like this.

**01:29:28**

Marcus Sheridan  
And you should use this almost like a KPI, all right? You should hear things from the client. They say things like, you know, no one's ever asked me that question. You know, I've worked with lots of agencies. No one has

ever said that to me before. You know, come to think of it, now that you ask or I think I've got it, all of those are examples of aha or light bulb moments. Your job, if you want to be an indispensable strategic guide, is to create these light bulb moments. But it only happens if you're using the law of three and asking those and deeper questions. Right? So instead of surface level, we go deeper with law of three. Now, an example of this.

**01:30:13**

Marcus Sheridan

If I am talking to a potential client, let's say, and I'm going to use you mar as my potential client, I might ask you this question. Now, this is a question that we teach all agencies to ask, and many of them haven't even asked a question like this before, especially during the sales process or during the kickoff call. So we. This is one of those that you ask twice. Right? Because usually it's a different person. So we want to ask this during the sales process and during the kickoff call. In most cases, yeah, you might refer back to what they said before, but.

**01:30:42**

Marcus Sheridan

We want to continue to roll with it.

**01:30:43**

Marcus Sheridan

So in this context, Chris, do you want to do sales or you want to do kickoff call?

**01:30:46**

Marcus Sheridan

We can do either one.

**01:30:48**

Chris Marr

Let's do kickoff.

**01:30:49**

Marcus Sheridan

All right, kickoff call.

**01:30:50**

Marcus Sheridan

I'm going to ask the question. All right, and then we're going to do this.

**01:30:52**

Marcus Sheridan

Let's try to do this briefly, Chris.

**01:30:53**

Marcus Sheridan

Because we can't spend much time on it, but I think we can touch it real quick. Okay, so, Chris, when you reflect on past relationships with agencies that you've had before, what didn't go well and why?

**01:31:06**

Chris Marr

Oh, how long have you got, Marcus? A lot of things haven't gone well with my agency partners in the past.

**01:31:13**

Marcus Sheridan

Yeah, yeah.

**01:31:14**

Marcus Sheridan

I'm sure a lot of things haven't gone well.

**01:31:16**

Marcus Sheridan  
But tell me this.

**01:31:17**

Marcus Sheridan  
If you had to choose one, like one thing that consistently hasn't gone well, what would you say that thing is now?

**01:31:24**

Marcus Sheridan  
Timeout.

**01:31:25**

Marcus Sheridan  
Before Chris answered this, notice how Chris gave me a non answer at first. Everyone, that wasn't answer. What Chris gave me, he gave the classic, oh, there's been a lot of things. This happens all the times with AMs, and too often the AM won't come back and get the answer which teaches the individual, in this case the client, that it's okay not to answer my question specifically, which is why the most powerful question you can use when you're doing deep discovery, believe it or not, isn't necessarily why the most powerful question is, but if you had to give answer, what would it be? But if you had to choose, what would you choose? But if you had to say, what would you say? It's all the same thing. So Chris says a non answer. Oh, where do I start? There's been a ton.

**01:32:14**

Marcus Sheridan  
And I say, but if you had to choose one, what would it be? All right, now I don't want to keep going here because that was just a small preface of law of three. And that would get us going. And Chris would keep going with that. To show you an example of a few more questions that you should be asking consistently to clients and potential clients, here's another example. Thinking about the culture of your organization, what could get in the way of us being successful at our highest potential? So when you think about the culture of your company, what might be the biggest roadblock for our success? Another one, what would need to be true for you to want to continue working together? Obviously this is a question that we want to ask. If suddenly someone is saying, I'm out, I'm done.

**01:33:08**

Marcus Sheridan  
So now this is one of those saved conversation questions. Obviously in a perfect world, we vanguarded long before we've had to ask it. But if you're having a saved conversation, this one is incredibly powerful. And then we're going to use law of three because they're going to resist it at first. They're going to say, I mean, there's probably nothing we could do at this point. I understand there's probably nothing we could.

**01:33:29**

Marcus Sheridan  
Do at this point.

**01:33:30**

Marcus Sheridan  
But if you had to say one thing, what would it be? And now all of a sudden you're going to start to get it and you can go further and further till you can see the thing that they're saying exactly as they see it.

**01:33:42**

Marcus Sheridan  
And that's what makes it so powerful.

**01:33:44**

Marcus Sheridan  
That's the law of three. To get to core, we have to.

**01:33:48**

Marcus Sheridan  
Learn to ask more.

**01:33:50**

Marcus Sheridan

And for many AMs, this is uncomfortable at first because they're not used to digging in this way, which is an issue. So in review, here's what we have said today, 68% of clients who leave agencies, in fact, Drew said this number was higher. Cite a lack of proactive strategic guidance as the reason they leave. We've got too many yes people. 57% of clients cite poor communication and transparency as the reason why they ended the agency relationship. Less than 5% of AMs have received consistent, organized role play training on how to effectively speak to clients. And that was less than 5% of this group. We need to stop being yes people and start being seen as trusted advisors. The way we do that is with four pillars. These four pillars will transform the way you communicate and that's what we want to teach you.

**01:34:44**

Marcus Sheridan

And obviously we're going to now explain an ongoing program that we have specifically designed for ams. We where we're going to teach you the power of yes and never getting thrown off again. We're going to teach you how to build, not break and use vanguarding to get in front of the issue before the issue comes out to use techniques like what we call the honest agreement to prevent those predictable problems. We're going to teach you how to use question first and make sure that you understand when you get hit with resistance, how to use those questions. You using activities like the pushback pivot, always thinking ask first and tell second and then finally law of three to create those beautiful light bulb moments and get past those surface level issues so as to get to core.

**01:35:33**

Marcus Sheridan

Okay, so question for the group and everybody, please put this in the chat. From what you've learned today, please put this in everyone. What you learned today. What's the one thing you're going to immediately apply to your day to day communication? Now, after we do this, I do want to tell everyone about this wonderful cohort that we're going to be doing with the AMI community. So stay with us because this is quite important. But with that, what's the one thing that you've heard today that you're saying? I am absolutely going to apply that. All right, Chris, anything that you've seen.

**01:36:05**

Chris Marr

So far, the pushback pivot is coming up like as the main thing here.

**01:36:12**

Marcus Sheridan

No surprise. And because we hear about it all the time, how it's affecting people on their day to day and it just makes you feel so much more prepared.

**01:36:22**

Marcus Sheridan

When things are going south.

**01:36:24**

Marcus Sheridan

Listen, this is not going to be easy, but I can tell you if you're willing to work it will completely and utterly change your life. Chris?

**01:36:35**

Chris Marr

Yeah, love it. Markus, let's talk with everybody about how we're going to continue this path. We've given you a flavor of the principles, the pillars today and given you a sense of what we're going to be working on. But this is part of a larger, a bigger program. This idea that we want to make this transformation from order taker to trusted authority. Right there in the middle of the screen here is the goal, right? To become a trusted authority. And of course, when we become a trusted authority, we can increase our respect that we get from our clients. We can drive better results for our clients and increase retention and expand our accounts. So that's what we're looking to do here, is to help.

**01:37:15**

Chris Marr

The mission is to work with account managers directly to give them that communication training that we so need that we identified at the beginning of our session today. So this program is specifically built for account managers to get them to this peer position with their clients. Now, there's a reason that we struggle to get there. There's three main blockers that hold us back from becoming a trusted authority. Number one is we're fumbling around. In other words, we don't have the tools, the top tracks, the frameworks and everything that we need to arm us with the competence and the skills to do it. We're faking it. We talked about imposter syndrome, right? There's that gap between where we are and where we want to be. We're trying to figure it out. It doesn't feel natural. We haven't made it part of what we do yet.

**01:37:57**

Chris Marr

So we want to overcome that. And of course, a big part of this is that we're on the back foot a lot of the time. We're not ahead. We're actually behind the client. The client is calling the shots. And we want to overcome this idea of following. So how do we overcome fumbling, how do we overcome faking? And how do we overcome the following? So let me take you through exactly what we're going to be working on together. So in order to go overcome fumbling, we need to get the scale skills. We need to work on the principles that we talked about today. We've given you a flavor of that today.

**01:38:24**

Chris Marr

We want to show you how to build peer authority from the beginning of your client relationships from the very start, and then also how to maintain your authority under pressure in high stakes situations. So we've got a lot of work that we want to do today on that. We talked about the pushback pivot today. That's an example of it. And then we want to go really deep into the system for your client Sessions. We have a 5S client session system that we go through and we go deep into how to set up, how to start, how to steer, how to summarize and how to sustain your client sessions. So we're going to go through all of that and that the purpose there is to give you the skills that you need so that you can actually do it well and do it right.

**01:39:08**

Chris Marr

Of course, we'll.

**01:39:10**

Chris Marr

What goes hand in hand with this is the confidence. Okay? Now Marcus and I have done enough work with enough people over the years to recognize that confidence is actually an output from skill acquisition and practice. So what we need to do together is more of what we did today. We need to practice these real role plays. Every lesson we have and every lesson that we run has real role plays, real client situations. One of the other special things that we do that I think is awesome is someone made mentioned this in the chat earlier is this idea of supervision. We are literally going to have you submit your client calls and I'm going to watch them.

**01:39:44**

Chris Marr

I'm going to watch the beginning, I'm going to watch the end, I'm going to watch the high stakes situations and I'm going to give you direct feedback on the skills that you're practicing in the moment. Most people don't get that type of attention. And of course we want to work on your mindset. In other words, we want you to truly believe and feel like a person, peer that high level of self respect, high level of self assurance and feel like a peer in every room that you walk into. And so we want to. This last piece here is shifting from following to a consultative approach in your work. You might not identify as a consultant, you may not call yourself a consultant, but ultimately we want you to get that authority and lead the client relationship.

**01:40:27**

Chris Marr

We're going to teach you how to grow your accounts. We've got a great program there. As part of the work that we're doing, we want to teach you to own your time. And this isn't just about your calendar, but it's about protecting your time so you can do your best work. And we want to talk about how we use AI workflows and systems to help you do your best work. And of course this final piece here is how do you lead a client

relationship with insight. In other words, how do you craft insight and experience and use it to inspire your clients and have them to aspire for more?

**01:41:00**

Chris Marr  
Right?

**01:41:00**

Chris Marr  
How do you share all that with your clients so that it lands? That's the map. And what we want to be looking at here is when you look at this, you should be asking yourself, where are my gaps right now? For some of you're not getting enough roleplay for some of you're not getting that client review. And for almost all of us, I think it's probably going to be this big section over here is that are we working through these tools, tried and tested frameworks, tools, methods, the talk tracks, the scripts. Do we have all of that so that we can actually do it right? So that's the map, that's the program. It's a 12 week program. And the impact here, of course we want to.

**01:41:35**

Chris Marr  
It's important that we can drive a thread from your competence in communication with your clients to how does that impact the agency? And of course, when we talk about increasing retention and expansion, your ability to handle high stakes situations with the clients, we talked about inviting tension into the relationship. To have an indispensable relationship with the client is going to drive value for the agency and dramatically reduce churn. A lot of organizations come to work with us because they have a retention problem. And of course the output of that is better work, is better results and of course better stories to tell, which ultimately attracts more clients. We want you to become that indispensable person for your clients. We want to get overcome imposter syndrome. So you feel truly confident and it's about you doing your best work.

**01:42:27**

Chris Marr  
I had a client say this to me recently after I was working with her on our first session as part of a team. She said, I feel like, Chris, that you really care about me being great at this and that's exactly what I'm here to do. And of course your authority skyrockets as a result. So let's talk about how we get there. Yeah, go ahead.

**01:42:45**

Drew McLellan  
Another advantage of this is talking about retaining your great account people when they feel better about the quality of their work, when they feel like they're indispensable inside your agency, when they're value for many of you know, these are your critical team members and you want to keep them growing, getting better, but also feeling really good about how they contribute to the agency.

**01:43:09**

Drew McLellan  
And that's also what we're talking about here, 100%.

**01:43:13**

Chris Marr  
I'm glad you brought that up, Drew. Yes, we. This is actually a great point. Why do people leave their agency? Right? Why do people, account managers leave? They're not growing, there's nowhere for them to go or they're not getting supported. So this is a great program that of course we can, we work with that too. The program's called Authority for Account Managers. This is a special cohort just for AMI account managers. So everybody in the Group will have you all have that one thing in common and we're going to keep it a small group of 35. We're doing 12 weekly 90 minute online sessions over 14 weeks. We're skipping over Christmas. By the end, you're going to have a full authority account manager, authority playbook with all the top tracks, things that you've learned today, all the scripts and frameworks.

**01:43:55**

Chris Marr  
You're going to get direct feedback on your client sessions, which is just a really special part of the program. There's a coaching platform and a mobile app to make it really easy for you to learn. And I'm going to be involved in that discussion on a week to week basis with more prompts and extra coaching. And of course

you're going to get a free copy of my book in audio format as well, so you can listen to my Scottish accent on the video.

**01:44:18**

Marcus Sheridan  
Yeah, we like it.

**01:44:19**

Chris Marr  
Yeah, Exactly. And Ewan McGregor, interestingly enough, Ewan McGregor was booked in directly after me to record audio in the same studio as me after doing my book, which was pretty cool. So what we're talking about becoming a trusted authority, order taker to authority, people pleaser to peer respect, results, retention, that's where we're going. And if you jump into the chat section, you'll find that someone in the team will have popped a link in there so you can see the full audience offer. You've got all the details for yourself about what to expect and what's involved and also the opportunity to actually register and purchase your space. Okay, it's first come, first serve. We've got a 35 person limit and we've got a limit for three per team and it's \$3,000 for the first seat and then \$2,000 for a seat thereafter.

**01:45:06**

Chris Marr  
I think, Drew, you're open to payment plans if people want to talk about that.

**01:45:10**

Drew McLellan  
So a couple thing, a couple things here. If you are a member, you'll see a discount when you go there, your normal member discount. And also if you need a payment plan, shoot us an email and we.

**01:45:25**

Drew McLellan  
Will work that out with you individually.

**01:45:26**

Drew McLellan  
So don't feel like we. As you know, at ami, we never.

**01:45:30**

Drew McLellan  
Want having all the money up front to be a barrier to you getting.

**01:45:33**

Drew McLellan  
The training that you need.

**01:45:34**

Drew McLellan  
So just reach out.

**01:45:36**

Drew McLellan  
Don't, don't be shy about it or feel bad about it.

**01:45:38**

Drew McLellan  
It happens all the time.

**01:45:40**

Chris Marr  
Cool, thanks for that, Drew.

**01:45:41**

Chris Marr

Yeah, I've got a few more things I want to share with you because one of the questions you might have is like the program doesn't start until the 11th of November. So what happens now when I purchase the program? Great question. Thanks very much for that. So what we've got is we've got two key bonuses that we want to give you. So for the first five agencies that purchase their place, what we're going to do is between now and the program begin. And we're going to book a game plan session where we'll work with your account managers and your owners in your agency to define your agency's goals for the platform for the program. Get crystal clear on what you want to achieve.

**01:46:16**

Chris Marr

I really want to have some critical conversations because things are going to change between the dynamic between your owner and your account manager and the client. And we need to have a conversation about that. So we're going to do that with the first five agents sign up. And then the second thing is for everybody, as soon as you sign up, I've put together an authority acceleration pack for you. It's 10 short videos. And these 10 videos are very short and can get you to do one thing that's going to move the needle for your authority. For example, we're going to give you the honest agreement talk track. I'm going to give you the pushback pivot playbook, and then there's another eight, another seven key authority accelerators that you can use.

**01:46:58**

Chris Marr

And so everybody going to get access to that immediately as well, which means you can actually plug the gap between now and the program beginning. I'm going to give Marcus some time to tell a story before we finish here, but I want to just say that, look, I mentioned this earlier. My mission is to make sure that you get as much as you can from this program. I don't even feel like I need to say this, but the best case in this program is that you're going to leave as the go to expert. You're going to have authority in your client relationships, you're going to increase retention, you're going to love your work more than you ever have. The worst case is like you don't like it and within the first couple of lessons you don't like it.

**01:47:35**

Chris Marr

If you don't love it, you can just tell us about it and we'll just buy it back from you and you can leave with everything that you've learned so far. I don't think that's going to happen. But in order to make sure that we all get the most from the program we need, there's a commitment from.

**01:47:49**

Chris Marr

Both of us, okay?

**01:47:50**

Chris Marr

For you, it's showing up, it's full attendance, it's doing your best to complete the homework, to put it into practice. The great thing about this program is I'm not going to ask you to do anything extra. All I'm going to ask you is to take what you're learning and actually use it in your client work. I'm not going to ask you to do two hours of video and all this stuff. It's just get into the weeds and get into the deep end with your clients. And as long as you commit to it, I am willing to work with you and I will work with you.

**01:48:18**

Chris Marr

Until you get the result that you're.

**01:48:19**

Chris Marr

Looking for here, that you're authoritative and.

**01:48:21**

Chris Marr

Leading your client relationships.

**01:48:23**

Chris Marr

So that's the program. I'm really looking forward to working with you. I am really looking forward to this long term relationship with Drew and Ami. And that's what we've got planned for you.

**01:48:34**

Marcus Sheridan

Marcus, Chris, we show that last slide for everyone. I just, I hope you feel like this has been worth your time today.

**01:48:41**

Marcus Sheridan

Even if you don't, if you, even.

**01:48:42**

Marcus Sheridan

If you're not part of the cohort. My biggest suggestion for you is that you start roleplay training at least once.

**01:48:48**

Marcus Sheridan

A week from this point going forward, that you no longer practice on your clients anymore.

**01:48:53**

Marcus Sheridan

Because if you do, magic happens. Let me just share with you this story. This happened after this type of webinar. This happened just recently, right after.

**01:49:02**

Marcus Sheridan

And this is the exact, this is their exact word. We just took a screenshot.

**01:49:05**

Marcus Sheridan

Right after Marcus Sheridan's training, we scheduled a role playing session to put the concepts into action. Days later, a client bypassed their am.

**01:49:13**

Marcus Sheridan

Sure we've all seen that and came straight to me.

**01:49:15**

Marcus Sheridan

This was the owner of the agency asking to cancel and requesting a refund. This time I chose not to default to my past behavior. Instead, I redirected them back to their account manager.

**01:49:27**

Marcus Sheridan

Wow, this is so powerful.

**01:49:29**

Marcus Sheridan

Fast forward this. AM had a powerful conversation. The client feels empowered and not only are they not canceling, they're now excited to implement advice they previously resisted.

**01:49:39**

Marcus Sheridan

Yes, yes.

**01:49:40**

Marcus Sheridan

Like, this is the goal. So all caps.

**01:49:44**

Marcus Sheridan

This stuff works. All thanks to pathfinding questions. And by the way, this whole system is called the Pathfinder System. And that's what we're going to teach you. It's for leaders, sales professionals and account managers.

**01:49:55**

Marcus Sheridan

And the goal is that you become a Pathfinder and you can ask extraordinary questions.

**01:50:01**

Marcus Sheridan

Now, we have bi weekly role playing calls scheduled and signed up for the 12 week cohort.

**01:50:06**

Marcus Sheridan

So pumped to watch RMS grow their skills and confidence. And we say the same for you and we're grateful for your time today.

**01:50:12**

Marcus Sheridan

Drew, did you want to bring us home?

**01:50:14**

Marcus Sheridan

Yeah.

**01:50:15**

Drew McLellan

Everybody, thanks for coming. Thanks for all the kind comments in the chat. We're glad. This was super valuable. Again, whether or not you decided during the cohort, hopefully you have a lot.

**01:50:25**

Drew McLellan

Of takeaways from this. I certainly think that there were some.

**01:50:27**

Drew McLellan

Skills taught that you absolutely can use with your team, with your clients, and.

**01:50:33**

Drew McLellan

That'S our goal with obviously all of our content.

**01:50:37**

Drew McLellan

People are asking what happens once the cohort gets filled? We will solve that problem when we get there, but we know that we only have 35 seats, and so. And we're hardcore holding to that because Chris wants to give everybody the right amount of attention. And so if this is something you're interested in, obviously with all of you.

**01:50:56**

Drew McLellan

Here and then everybody else in the.

**01:50:57**

Drew McLellan

AMI community, I think this is going to fill up pretty fast.

**01:51:00**

Drew McLellan  
So I wouldn't wait too long.

**01:51:01**

Drew McLellan  
But, Chris, they were. People were asking the name of your book.

**01:51:05**

Chris Marr  
Oh, become an authoritative coach.

**01:51:09**

Marcus Sheridan  
Yeah, just. Just down to the left of Chris.

**01:51:11**

Marcus Sheridan  
There on the shelf.

**01:51:12**

Drew McLellan  
Oh, there you go.

**01:51:13**

Chris Marr  
So the key is the subject, challenge. Stop people pleasing.

**01:51:17**

Chris Marr  
Challenge your clients and be indispensable.

**01:51:20**

Drew McLellan  
Yeah.

**01:51:20**

Drew McLellan  
So hopefully this was super helpful. We will get the replay out so you can share it with your whole team by the end of the week. If you have any questions, you know how to get a hold of us at ami, so feel free to shoot.

**01:51:30**

Drew McLellan  
Any questions you have.

**01:51:31**

Drew McLellan  
And I'm excited about this. I think it's going to be a.

**01:51:34**

Drew McLellan  
Game changer for a lot of you.

**01:51:36**

Drew McLellan  
And, and I think you've just seen.

**01:51:37**

Drew McLellan  
In the last 90 minutes just some.

**01:51:39**

Drew McLellan

Skills that seem pretty obvious, but we.

**01:51:41**

Drew McLellan

Don'T deploy them on a regular basis. So it's all about practice. We know that.

**01:51:45**

Drew McLellan

So thanks everybody for coming. You've got the link in the chat. I will also include it with the replay if you didn't grab it. So have no fears. And if you need the replay link.

**01:51:56**

Drew McLellan

Watch for an email from us coming later this week.

**01:51:59**

Drew McLellan

Okay, thanks, Marcus and Chris, super grateful to partner with you guys on this.

**01:52:03**

Drew McLellan

Super excited about how it's going to play out.

**01:52:05**

Drew McLellan

So appreciate all of you. Thank you.