Agency Management Authority Program

Meeting Date: September 23, 2025, 11:37 am

Notes

Agency Industry Crisis & AI Disruption

- **Massive client retention crisis** affecting agency industry with **68% of departing clients** citing lack of proactive strategic guidance as primary departure reason (36:56)
    - AMI research indicates numbers are actually higher than the presented statistics
    - **57% cite poor communication and transparency** as relationship-ending factors
    - Root cause identified as Account Managers functioning as "yes people" rather than strategic advisors
    - Traditional agency revenue streams under severe AI threat within 5-year timeline
- **AI automation projections** show **75% reduction** in paid ads, web design, and SEO services capabilities (34:12)
    - Social media services projected for **50% automation** impact
    - Numbers acknowledged as debatable but directionally accurate across industry experts
    - Agencies must transition from service providers to "indispensable strategic guides" for survival
    - Future revenue model requires AI training services, self-service tools, and strategic consultation

Communication Training Gap Analysis

- **Critical skills deficit** revealed through live polling showing **less than 5%** of attendees received communication training in past year (39:05)
    - Average training frequency among **334 registered participants** ranged from **0-1 sessions annually**
    - Multiple attendees reported **begging supervisors for training** with no response
    - Industry standard practice involves Account Managers learning communication skills during high-stakes client interactions
    - **Majority of participants** admitted avoiding difficult conversations to preserve client relationships rather than provide honest guidance
- **Role-play resistance phenomenon** addressed as core barrier to skill development (32:23)
    - Semantic shift from "role plays" to "real role plays" to overcome participant skepticism

- Emphasis on treating practice scenarios as actual client situations for maximum learning impact
- Success directly correlates with participant willingness to fully engage in simulated scenarios

Four Pillars Communication Framework

- **Yes, And Principle** designed to transform any energy into forward momentum (50:54)
  - Core concept: "receiving any energy, good, bad or ugly, and transforming it into forward momentum"
  - Facial expression and body language critical components beyond verbal responses
  - Account Managers often unaware of appearing "grumpy" during client interactions until video review
  - Key focus on moving conversations forward rather than getting stuck in negative spaces
- **Vanguarding methodology** for proactive issue prevention (01:03:42)
  - Definition: "foreseeing what could go wrong, being hyper aware of potential concerns and resolving them up front"
  - Roman army origin - vanguard unit formed V-formation as tip of spear into battle
  - **Webinar vanguarding examples**: role-play explanation, participant call-out warning, data disclaimer
  - Individual participant responsibility assignment eliminates awkward silence and increases participation rates
  - **Honest Agreement protocol** generates immediate respect and authority in client relationships
- **Question First strategy** eliminates defensive responses and creates client ownership (01:21:07)
  - **Pushback Pivot technique**: Repeat exact negative phrase + "tell me more about that"
  - Shorter questions demonstrate higher authority than lengthy explanations
  - Works across sales situations: "expensive" "expensive, tell me more about that"
  - Requires matching facial expression and energy to disarm rather than escalate situations
- **Law of Three methodology** breaks through surface-level client responses (01:29:28)
  - Recognition that real understanding requires successive thoughtful questions
  - Target outcome: client "light bulb moments" with phrases like "no one's ever asked me that"
  - Example questions: "When you reflect on past agency relationships, what didn't go well and why?"

- Follow-up technique: "But if you had to choose one, what would it be?" to overcome non-answers

Live Training Demonstrations & Participant Results

- **Interactive role-play exercises** conducted with **6 participants** demonstrating real-time skill application (51:42)

    - **Jen Newman** handled camera technical difficulties scenario with pressure-relief approach

    - **Erik Martinez** managed 12-minute late arrival situation with quick recap protocol

    - **Laura Williams** addressed dashboard loading failure using prepared backup solutions

    - **Alex Nikdel** navigated nonsensical client answers using validation and question repetition

    - **Sarah Martin, Rich Cannabis, Lori Hybe** practiced pushback pivot technique with negative client statements

- **Honest Agreement demonstration** with **Brad Gillum** as mock branding client (01:09:13)

    - Full script walkthrough establishing mutual commitment to transparency and honesty

    - Client agreement to voice disagreements immediately rather than suppressing feedback

    - **Leah Moore** executed complete honest agreement protocol demonstrating scripted approach benefits

    - Emphasis on referring back to agreement during future relationship tension points

- **Participant engagement metrics** showed **majority yes responses** to avoiding difficult client conversations

    - **50/50 split** on currently avoiding difficult conversations with clients

    - **6-7 average score** on 10-point scale for honest agreement implementation

    - **Pushback pivot identified** as most immediately applicable skill by participant feedback

Authority for Account Managers Program Launch

- **Comprehensive 12-week cohort program** starting **November 11th** with strict **35-person capacity limit** (01:44:18)

    - **$3,000 first seat, $2,000 additional seats** with **maximum 3 participants per agency**

    - AMI member discount applicable with payment plan options available

- **Weekly 90-minute online sessions** over **14-week period** (skipping Christmas break)
- **Direct client call review and feedback** - participants submit actual client sessions for coaching analysis
- **Program curriculum addresses three core barriers**: fumbling (lack of tools), faking (imposter syndrome), following (reactive positioning) (01:37:48)
  - **5S Client Session System**: Set up, Start, Steer, Summarize, Sustain methodologies
  - **Peer authority building** from relationship inception through high-stakes situation management
  - **Consultative approach training** including account growth, time ownership, AI workflow integration
  - **Authority playbook deliverable** with complete talk tracks, scripts, and frameworks
- **Exclusive bonuses for early adopters** including **game plan sessions for first 5 agencies** (01:46:48)
  - **Authority Acceleration Pack**: 10 short videos with immediate implementation strategies
  - **Honest Agreement talk track** and **Pushback Pivot playbook** included in starter materials
  - **Book audio format included** with Chris Marr's Scottish narration (recorded same studio as Ewan McGregor)
  - **Money-back guarantee** for first couple lessons if program doesn't meet expectations

Success Story & Transformation Impact

- **Recent client transformation case study** demonstrates immediate program impact following similar training (01:49:45)
  - Client initially bypassed Account Manager to request cancellation and refund directly from agency owner
  - Owner redirected client back to Account Manager instead of defaulting to past accommodation behavior
  - Account Manager conducted "powerful conversation" using pathfinding questions methodology
  - **Result**: Client retained, excited to implement previously resisted advice, and feels empowered
  - Agency now conducts **bi-weekly role-playing calls** and enrolled entire team in 12-week cohort
- **Expected program outcomes** include increased retention, account expansion, and authority positioning

- **Indispensable relationship development** dramatically reducing client churn rates

- **Better work quality and results** leading to stronger case studies and client attraction

- **Account Manager retention improvement** through professional development and confidence building

- **Imposter syndrome elimination** enabling peer-level client relationship dynamics

Action items

Chris Marr
- Send presentation deck file to Marcus via email (09:23)

- Share landing page URL in chat during appropriate moments throughout webinar (14:53)

- Handle magic model section presentation during webinar (10:00)

Kelsey McLellan
- Text registration URL to Drew for chat distribution (15:48)

- Monitor chat and provide technical support responses (12:24)

Drew McLellan
- Call on participants for role-play exercises as requested by Marcus (14:20)

- Drop registration link in chat at appropriate times (15:42)

- Send replay with notes to all registrants by end of week (23:09)

Unassigned
- Apply one key takeaway from session to daily communication immediately (01:36:05)

- Consider registering for Authority for Account Managers program if interested (01:44:18)