

## AE Bootcamp Course Syllabus

### Course Overview

**Program Name:** AE Bootcamp

**Duration:** Two days (16 hours total)

**Instructors:** Agency Management Institute Faculty

**Format:** Interactive workshop with lectures, group exercises, and practical application

### Course Description

AE Bootcamp is an intensive two-day professional development program designed for account executives, account managers, and client service professionals in marketing agencies. This workshop addresses the unique challenges of being "the eye of the storm" in agency operations, balancing client needs, internal team dynamics, and agency profitability while delivering exceptional strategic partnership to clients.

### Learning Objectives

Upon completion of this course, participants will be able to:

- Demonstrate servant leadership principles to effectively manage client relationships, internal teams, and agency owner expectations
- Apply the Platinum Rule (treat others as they would like to be treated) in professional communications
- Implement effective communication techniques including active listening, reflective listening, and the Right vs. Rich conversation framework
- Calculate and apply agency financial metrics including AGI (Adjusted Gross Income) and profitability models to inform business decisions
- Develop and present pricing strategies using the "Magic of 3" pricing framework
- Create comprehensive scope documents and project authorizations that protect profitability and manage client expectations
- Utilize project management tools and time management techniques to maintain organization across multiple clients and projects
- Build annual client growth strategies targeting 10% year-over-year revenue increases
- Generate consumer and market insights that lead to stronger creative work and strategic recommendations
- Execute account management best practices including traffic meetings, daily huddles, status reports, and change order processes

## **Course Outline**

### **Day One**

#### **Module 1: The Big Picture**

##### **Topics Covered:**

- Understanding your role as the nucleus of controlled chaos
- What clients want and need from account leaders
- What internal teams need and want from account leaders
- What agency owners need and want from account leaders
- Account service role definitions and responsibilities
- Servant leadership principles: serving clients, teams, and ownership

##### **Learning Activities:**

- Introductions and challenge sharing exercise
- Group discussion: Absolutes vs. Reality in account management
- Role mapping exercise

#### **Module 2: Client Communication Excellence**

##### **Topics Covered:**

- Communication principles: Golden Rule vs. Platinum Rule
- Perception stages: Initial and sustained perception over time
- Non-verbal communication and its impact
- Active listening techniques and skills
- The Right vs. Rich conversation framework (4-step application process)
- Email etiquette: Purpose, strategic alignment, and execution
- Meeting etiquette: Preparation, participation, and follow-up

##### **Learning Activities:**

- Listening skills assessment
- Email rewriting exercise (before/after examples)
- Right vs. Rich conversation practice scenarios

### **Module 3: Project Management Foundations**

#### **Topics Covered:**

- Time management techniques (Eisenhower Matrix, time blocking, Pomodoro, Two-Minute Rule, task batching, 80/20 Rule, Eat That Frog)
- Project management tools overview
- Task deadline management best practices
- Team collaboration strategies for remote and hybrid environments
- File storage and sharing protocols

#### **Learning Activities:**

- Time audit reflection
- Tool selection discussion
- Personal time management strategy development

### **Module 4: Agency Financial Literacy**

#### **Topics Covered:**

- Agency math fundamentals: Revenue, COGS, and AGI defined
- The 56-cent rule: How agencies distribute billing dollars
- Ideal agency model: 55% salaries, 25% overhead, 20% profit
- AGI vs. COGS determination exercises
- Understanding how write-offs impact agency profitability
- The cost of mistakes: Why \$5,000 write-off requires \$89,285 in new billing
- AGI estimating hacks: 1.3x and 1.5x multipliers

#### **Learning Activities:**

- COGS vs. AGI categorization quiz
- AGI calculation exercises
- Write-off impact scenarios

### **Module 5: Strategic Pricing and Client Growth**

#### **Topics Covered:**

- The Magic of 3 pricing strategy
- Presenting small, medium, and large options to clients
- Building the ideal sale (middle option)

- Pricing integrity and value communication
- Client growth planning: The 10% annual growth mandate
- Why 60-70% of net new revenue should come from existing clients

**Learning Activities:**

- Three-option pricing exercise
- Client growth opportunity identification

**Day Two**

**Module 6: Agency Edge Research Insights**

**Topics Covered:**

- Key findings from Agency Edge Research (2023)
- What clients say they want: Strong relationships over time (81% strongly agree)
- Why clients fire agencies (quality issues 51%, cost 33%, unmet expectations 29%)
- Evidence-based marketing: Clients demand proof that strategies work
- Client evaluation metrics and how your contacts are measured

**Learning Activities:**

- Research findings discussion
- Client relationship self-assessment

**Module 7: Growing Your Biggest Responsibility**

**Topics Covered:**

- Your three core responsibilities: Client satisfaction, team support, profitability
- How to know more so you can help more
- Getting smarter on your client's behalf: Industry research, firsthand observations, avoiding assumptions
- Becoming a true thinking partner and strategic advisor
- Client ranking and investment prioritization exercise

**Learning Activities:**

- Client value ranking exercise
- Three ways to get smarter for each top client
- Creating actionable timelines for client intelligence gathering

## **Module 8: Insights and Strategic Thinking**

### **Topics Covered:**

- Definition of insights: Profound human truths presented in fresh, stimulating ways
- Where insights come from: Brand, consumers, competition, market, product, channels, culture, future, environment
- Better questions lead to better work
- The Sweet Spot exercise: Finding the intersection of client truths, industry truths, and competitor truths

### **Learning Activities:**

- Homework review: Questions that lead to stronger insights
- Sweet Spot mapping exercise (Blue/Pink/Yellow circles)
- Challenge board topic deep-dive (table discussions)

## **Module 9: Protecting Profitability**

### **Topics Covered:**

- Your second core responsibility: Protecting the profit
- Estimate wisely using 1.3x and 1.5x multipliers
- Three-option proposal presentation strategy
- Kickoff meeting protocols
- Daily timesheets and accountability
- 5-minute huddles for team alignment
- Scope creep identification and management
- Managing project lags
- AGI and profitability tracking methods

### **Learning Activities:**

- Scope document review and critique
- Change order scenario practice

## **Module 10: Essential Account Management Tools**

### **Topics Covered:**

- Marketing plan structure and components
- Client SMART goals vs. objectives

- Scope documents and project authorizations (detailed deliverables, timelines, revision limits, flat fees, payment terms)
- Marketing and creative briefs (information pyramid, client signature requirement)
- Client contact reports and meeting minutes
- Weekly status reports (format and Thursday afternoon delivery)
- Traffic meetings (Monday 10 AM, Thursday 1:30 PM standards)
- Daily huddles (15-20 minute stand-ups)
- Change order processes and the "one free" philosophy
- Invoice best practices (attach signed PA, personal thank you)
- Decision-making framework: DACI (Driver, Approver, Contributor, Informed)

**Learning Activities:**

- Sample status report review
- Meeting minutes template practice
- Scope document development exercise

**Module 11: Challenge Solutions and Best Practices****Topics Covered:**

- Common challenges review: Process, delegation, client management, internal team dynamics, profitability
- Strategies for managing up: Earning owner trust, professional development, asking for help
- Client management strategies: Quarterly client grading, Big Idea sessions, expectation setting
- Internal team best practices: Creative briefs, team huddles, setting clear expectations
- Time management strategies: Time batching, prioritization, delegation
- Professional development responsibility (staying sharp and inspired)

**Learning Activities:**

- Challenge topic table discussions with solution sharing
- Managing up conversation practice
- Resource sharing: Recommended books, podcasts, and thought leaders

## **Module 12: Implementation and Accountability**

### **Topics Covered:**

- Creating your implementation action plan: Week one, month one, quarter one commitments
- Communicating learnings to agency leadership
- Building peer accountability networks
- Ongoing professional development resources
- Always staying at the "bottom of the list" (minimizing problems you create for others)

### **Learning Activities:**

- "Dear Boss" letter writing exercise
- Peer accountability group formation
- Contact information exchange

### **Required Materials**

- Workshop presentation deck (provided)
- Note-taking materials
- Calculator or spreadsheet access for financial exercises
- Current client list and account information for exercises
- Laptop or tablet for collaborative exercises

### **Evaluation and Assessment**

Participants will be evaluated based on:

- Active participation in discussions and exercises (40%)
- Completion of homework assignment (10%)
- Group exercise contributions and presentations (30%)
- Final implementation action plan (20%)

### **Certificate of Completion**

Participants who complete all workshop requirements and attend both full days will receive an Agency Management Institute Certificate of Completion for AE Bootcamp.