

## **Advanced AE Bootcamp: Running Your Book of Business Like a Small Agency Syllabus**

### **Course Description**

Advanced AE Bootcamp is a two-day, in-person workshop designed for experienced account executives, account managers, and account supervisors who are ready to run their accounts like an owner, not an order taker. Participants deepen their agency math skills, negotiate with confidence, think and sell like consultants, and build strategic, measurable growth plans for their client portfolios. Through hands-on exercises, live negotiation practice, profitability labs, and strategic planning work, they learn how to grow and retain clients, protect profit, and lead their internal teams with intention.

### **Course Format**

- Duration: 2 full days (in person)
- Methods: Short lectures, facilitated discussions, group exercises, live negotiation role-play, profit and pricing exercises, strategic planning labs, and peer feedback
- Instructor: Senior agency owner/AE leader with 20+ years of experience and AMI background

### **Target Audience and Prerequisites**

This course is designed for:

- AEs, account managers, and account supervisors with several years of account service experience who already understand core AE fundamentals.
- Emerging directors of client services and senior account leaders who own significant books of business and influence agency financial performance.

Recommended prerequisite:

- Completion of AE Bootcamp or equivalent experience with: basic AE role expectations, foundational agency math, communication basics, and day-to-day project management. [AE-Bootcamp-Oct-2025.pdf+1](#)

### **Learning Outcomes**

By the end of Advanced AE Bootcamp, participants will be able to:

- 1. Negotiate value and scope**
  - Apply structured negotiation frameworks (needs analysis, BATNA, mutual gains) to reach win-win agreements with clients.
  - Confidently discuss budget, timing, and deliverables while protecting both client outcomes and agency profit.
- 2. Use advanced agency math to manage profitability**
  - Distinguish between revenue, COGS, and AGI at a deeper level and calculate job, client, and portfolio profitability.

- Analyze scenarios (e.g., write-offs, over-servicing, pricing shifts) and make recommendations to improve margins.
- 3. **Run accounts like a small business (“franchise”)**
  - Create and manage a plan to grow their book of business, including financial benchmarks and growth targets.
  - Track and respond to KPIs for profitability, retention, and growth on a client-by-client basis.
- 4. **Act as a strategic consultant, not a vendor**
  - Use structured discovery, diagnostic questions, and business-model understanding to uncover real client issues.
  - Build and articulate insights that connect data, industry trends, and competitive context into compelling strategic recommendations.
- 5. **Align marketing recommendations with business and revenue goals**
  - Map client goals, objectives, strategies, and tactics (including funnel math, budget alignment, and lifetime value).
  - Use numbers (conversion rates, pipeline requirements, LTV, ROI) to set realistic expectations and defend budgets.
- 6. **Identify and execute strategic upsell and growth opportunities**
  - Develop and position growth initiatives (e.g., crisis communications, reputation management, research, AI consulting) that add value and margin.
  - Prioritize growth opportunities across their portfolio based on client value, potential, and risk.
- 7. **Lead the internal team as a senior account leader**
  - Demonstrate leadership behaviors that support creative, strategy, and production teams.
  - Coach others, model agency processes, and create clarity around expectations, priorities, and “the why.”
- 8. **Implement personal action and accountability plans**
  - Translate workshop concepts into a 1-week, 1-month, and 1-quarter action plan and communicate it to their agency leadership.
  - Establish peer accountability mechanisms to sustain behavior change after the workshop.

## Course Outline

### Day One

#### Module 1 – Framing the Advanced AE Role

- Revisiting “eye of the storm” and updated expectations as a senior AE
- What clients, teams, and owners need from advanced account leaders today
- Running a “franchise” inside the agency: viewing your book of business like a small P&L

**Outcomes:** Participants articulate how their responsibilities expand beyond task management into business ownership, growth, and leadership.

## Module 2 – Advanced Agency Math and Profitability Lab

- Deep dive: revenue vs. COGS vs. AGI and true operating dollars
- Ideal vs. average financial models (55/25/20, AMI averages, and typical agency reality)
- Impact of write-offs and over-servicing (e.g., how a 5K write-off can require 178K in billings at 5% profit)
- Profitability exercises using real-world campaign scenarios (EcoTech SolarWave case)

### Activities:

- Group AGI calculation exercises
- Scenario analysis: “Are we on track to meet profit targets?”

**Outcomes:** Participants can analyze and discuss profitability at job and client levels, and suggest concrete changes to improve margins.

## Module 3 – Negotiation Skills for AEs

- Negotiation basics for agency/client relationships: persuasion, conflict resolution, compromise
- Understanding client constraints, risk, and internal politics
- Preparing for negotiations: knowing your numbers, BATNA, and options
- Communication skills: active listening, emotional intelligence, and language that maintains relationships

### Activities:

- Paired negotiation role-play (Account Manager vs. Marketing Director) with defined scope, features, budget, and timeline; 10-minute negotiation to agreement
- Group debrief: what worked, what didn’t, and how to apply back at the agency

**Outcomes:** Participants leave with a repeatable negotiation approach they can apply to scope, fees, timelines, and performance conversations.

## Module 4 – Growing Existing Clients and Protecting Key Accounts

- Revisiting the “biggest responsibility”: growing existing clients and retaining them
- Understanding why clients leave (value, ideas, results, perceived priority) and how to intervene early
- Client value grading: assessing fiscal responsibility, teamwork, profitability, and growth potential

### Activities:

- Client portfolio exercise: listing all clients, ranking by value, and identifying growth and retention strategies per client

**Outcomes:** Participants produce a prioritized list of accounts with specific growth/retention plans tied to each client’s value and potential.

## Day Two

### Module 5 – Strategic Thinking, Insight Development, and Consultant Mindset

- Understanding client buying environments: post-C19 pressures, budget constraints, sales accountability, data expectations
- Moving from “tactic first” to diagnosis first: mission, goals, objectives, KPIs, strategies, tactics
- Building insights: using data to describe, interpret, and evaluate, then expressing a crisp insight with tension
- “Sweet Spot” model: truths about the client, their industry, and their competitors

#### Activities:

- Insight lab using real data (e.g., Google Trends example for regional interest)
- Team “agency pitch” homework: positioning a hypothetical client in a differentiated sweet spot, presented and critiqued in class

**Outcomes:** Participants can create and present insight-driven recommendations that move beyond tactics and demonstrate true consultative value.

### Module 6 – Aligning Budgets, Funnels, and Business Results

- Understanding client business models: revenue, cost drivers, critical success factors
- Funnel math: mapping inquiries → leads → opportunities → proposals → new customers and revenue
- Budget alignment: testing whether stated goals, funnel performance, and budget actually match
- Lifetime value, ROI, growth rate, and customer lifetime value formulas in a usable, non-technical way

#### Activities:

- Funnel and budget exercise: reverse-engineering how many leads, opportunities, and proposals are needed to hit a revenue goal
- LTV and ROI mini-case (e.g., “What if we owned a gym?”)

**Outcomes:** Participants can use simple, concrete numbers to set expectations, defend budgets, and reframe “grow my business” conversations.

## Module 7 – Designing Growth and Upsell Opportunities

- Beyond “more customers”: price, cost reduction, upsell, retention, referrals, subscriptions, new markets
- High-value upsells: crisis communications plans, online reputation management, research, AI consulting, etc.
- Using transparency, KPIs, and results to create more senior, trusted-partner conversations

### Activities:

- Account growth plan: identifying 2–3 realistic upsell/expansion opportunities for selected clients and mapping how to position them

**Outcomes:** Participants build a practical upsell roadmap for their own accounts that balances client value and agency profitability.

## Module 8 – Leading the Team and Managing Time at the Next Level

- #3 responsibility: leading the team as a senior AE
- Leadership behaviors: championing the agency, modeling process, coaching, giving “the why,” public gratitude
- Advanced time management: Eisenhower Matrix, 3/3/3, batching, audits, and boundaries in a senior role

### Activities:

- Leadership reflection exercise: identifying specific behaviors to emulate from favorite past leaders
- Time-blocking and “time sucks” mapping for their current workload

**Outcomes:** Participants define concrete leadership behaviors and time strategies to support their team and their expanded responsibilities.

## Module 9 – Personal Implementation and Accountability

- Professional development as shared responsibility and ongoing practice
- Curating a personal “keep getting better” plan (content, podcasts, sites, and communities)
- Writing an action plan email to their boss summarizing next-week, next-month, and next-quarter commitments

### Activities:

- Draft and refine the “Dear Boss” action-plan email using provided template
- Peer-to-peer accountability planning (how they’ll stay connected post-workshop)

**Outcomes:** Each participant leaves with a written, sharable implementation plan tied to specific behaviors and outcomes.

### **Assessment and Completion Criteria**

To receive a **Certificate of Completion: Advanced AE Bootcamp (Agency Management Institute)**, participants must:

- Attend both full days of the workshop (minimum 90% of scheduled time).
- Actively participate in group discussions, exercises, and role-plays (including the negotiation exercise and insight lab).
- Complete all in-session worksheets and calculations (AGI/profit exercises, client portfolio ranking, funnel/budget alignment work).
- Submit a finalized, written action plan (the “Dear Boss” email) outlining at least three concrete implementations over the next week, month, and quarter.

Optional but encouraged:

- Share their action plan with agency leadership within one week of returning to the agency and schedule a follow-up check-in.