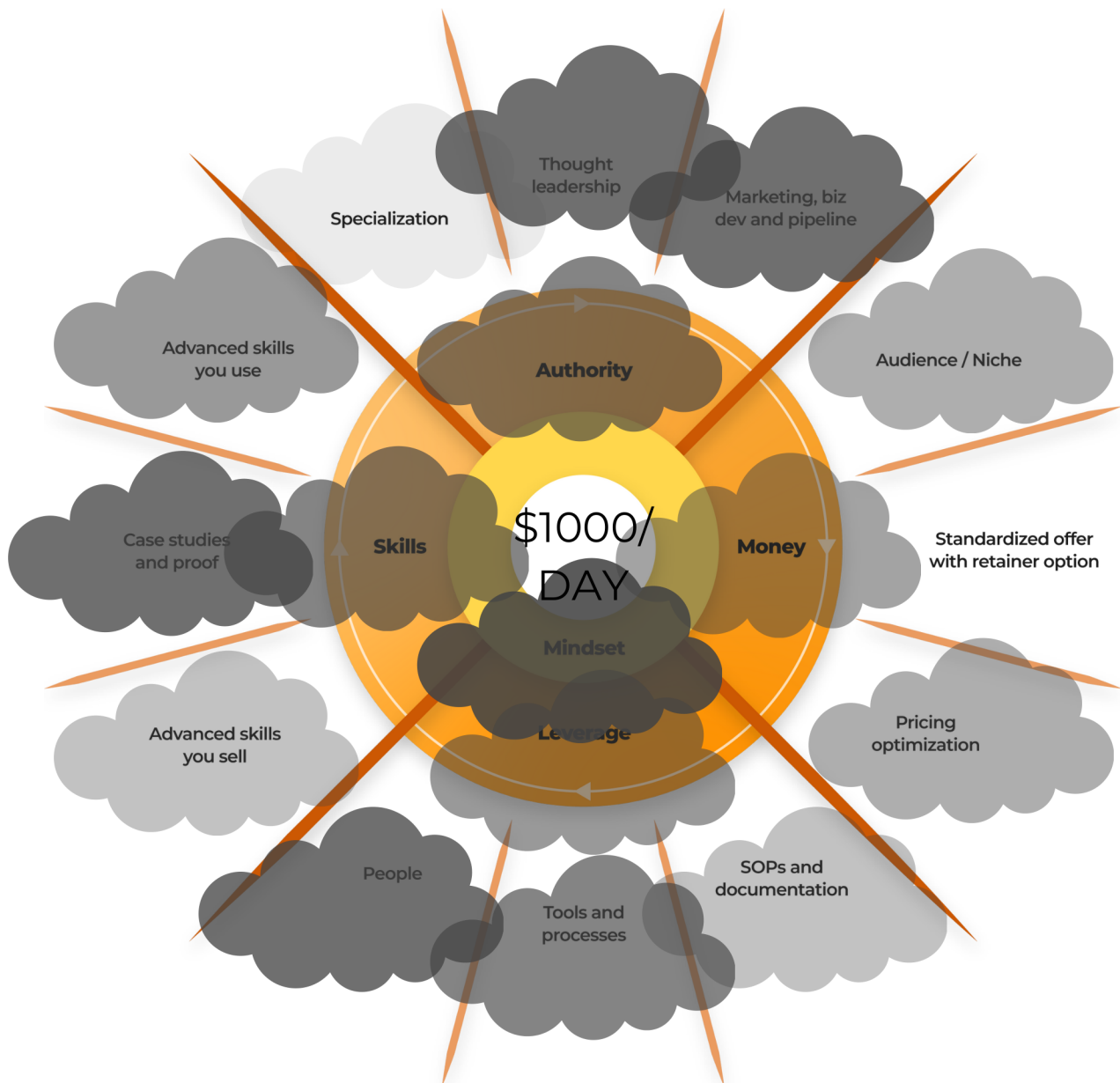# *WEEK 3:*

YOUR RETAINER OFFER (MRR)

The second of your two Authoritative offers.

Fully systematize every part of your retainer offer that isn't custom.

You'll use this to get leverage! Do the work faster, and train others to do it.

THIS WEEK'S SECTIONS OF THE SUNSHINE GROWTH MODEL

Week after week, we will reduce the clouds for several sections of this growth model.

Thought leadership

Specialization

Marketing, biz dev and pipeline

Advanced skills you use

Authority

Audience / Niche

Case studies and proof

Skills

$1000/ DAY

Money

Standardized offer with retainer option

Mindset

Advanced skills you sell

Leverage

Pricing optimization

People

Tools and processes

SOPs and documentation

INTRO

INTERMEDIATE

ADVANCED

S A
$ L

BUILDING ON WEEK ONE'S WORK...

My standardized offer is...

My corresponding optimization retainer is...

I will start by charging this flat rate for it...

I will start by charging this monthly recurring rate for it...

The basic mechanics of what I'll do are...

Every month, I'll be able to optimize for results by...

- [ ] My clients will see value on delivery
- [ ] My clients will see the value of continued optimization
- [ ] I can standardize this to >60%
- [ ] The work can be completed in 5-6 business days
- [ ] An average person can be trained to do this work well, with little oversight

- [ ] My clients will see stacking value
- [ ] My clients will see the value of continued optimization
- [ ] I can standardize this to >60%
- [ ] The work can be completed in 3 business days
- [ ] An average person can be trained to do this work well, with little oversight
- [ ] I can report on performance monthly

BUILDING ON WEEK TWO'S WORK...

☐ My standardized $10K offer is based on a process that is 3 or 4 steps (no more, no less)

STEP ONE	STEP TWO	STEP THREE	STEP FOUR

☐ Leads ☐ $ ☐ Leads ☐ $ ☐ Leads ☐ $ ☐ Leads ☐ $

I WILL CREATE (SOPs, SCRIPTS, ETC)	BY

I WILL HIRE & TRAIN	BY

INTRO — INTERMEDIATE — ADVANCED

Profits go up when time spent goes down.

Time budgets are as real as money budgets.

You and your team should spend minutes with the same mindset you use when spending dollars.

⏱ If you budget 30 mins, you do not have 90 mins to spend!

⏱ If you go over budget, there **must** be a consequence

⏱ Put mechanisms in place to stay ahead of minutes spent

⏱ Use a reliable time tracker to track time like you do costs

THIS WEEK'S WORK IS LARGELY DONE FOR YOU

Make these templates and documents your own! The core of the work is done for you. In combination with your documentation from Week 2, you should be in great shape with your offers.

SOP to Run a Retainer (Monthly)

Use and modify this standard operating procedure for running an effective monthly retainer with at least one assistant (VA).

https://copyhkr.com/tif-retainer

Template to Track Retainer Results

Treat this spreadsheet like a private diary about your clients. You'll make a sheet for each client and fill it in regularly.

https://copyhkr.com/tif-retainer

Template for Monthly Reporting

Brand this presentation template, or recreate it in your favorite presentation tool. Fill it in regularly, as per your SOP.

https://copyhkr.com/tif-report

Train your people well from Day One.

Budget at least <u>3 full days</u> for training.

The more time you dedicate to training and role playing with your team, the more money you'll make.

🧐 Meet up in person, in a quiet space, with a desk

🧐 Have their laptop ready to go and pre-loaded with files

🧐 Walk them through each part of their job and each SOP

🧐 Role play to surface unexpected scenarios

🧐 You're their manager / boss first, friend second or third

IF LEADS / CONVERSIONS ARE DOWN...

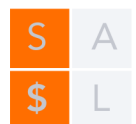**Your retainer is simply ongoing optimization of the standardized project you did for the client.**
When you do this sort of work for clients, what do you generally find you're guessing too much at, what could go any number of ways, what did you have a lot of options or ideas for? Brainstorm them here!

WHAT CAN YOU DO TO OPTIMIZE EACH STEP WHEN YOU SEE ROOM TO IMPROVE?

Not sure if you're measuring leads or customers in a step? Refer back to your work from Week 2.

In STEP ONE, I can typically optimize...

	Leads / Appointments		Revenue / Customers

In STEP TWO, I can typically optimize...

	Leads / Appointments		Revenue / Customers

In STEP THREE / FOUR, I can typically optimize...

	Leads / Appointments		Revenue / Customers

Across the FULL PROJECT or as an outcome of it, I can typically optimize...

	Leads / Appointments		Revenue / Customers

INTRO   **INTERMEDIATE**   ADVANCED
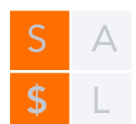
WHAT I STILL <u>NEED</u> TO DELIVER MY RETAINER

Refer to the documents provided to you this week as well as what you crafted last week.

People

	GOT IT	NEED IT

Processes, SOPs & Documentation

	GOT IT	NEED IT

WHAT I STILL NEED TO DELIVER MY RETAINER

Scripts & Templates

	GOT IT	NEED IT
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

Software, Hardware & Tools

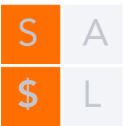|	GOT IT	NEED IT
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

INTRO   **INTERMEDIATE**   ADVANCED

MY THOUGHTS AS WE HEAD INTO WEEK 4

Stuff that's getting in my way...

Stuff I'm excited about...

Questions for coaching...