Relationship-First
STRATEGIC ENGAGEMENT

An Agency Owner's Guide To
Greater Conversion And Loyalty

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Relationship-First Strategic Engagement

An Agency Owner's Guide To Greater Conversion And Loyalty

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Foreword

As the founder of Predictive ROI—a marketing agency that serves other marketing agencies—I've heard firsthand the business development challenges, pitfalls, and obstacles of many successful and not-so-successful agency owners. After nearly thirty years of working alongside owners, some patterns have emerged from all those data points.

If I look at what areas could help an agency and transform its success in business development—in my opinion—one of the most significant opportunities is doubling down on how they create strategic relationships to right-fit clients and prospects. And the good news for you reading this book is that the bar is pretty low. Most agencies overlook the strategies in this book or make excuses about time investment, etc. However, if you and your team embrace what Jamie Shibley has shared within these pages—you will step away from the sea of sameness because the typical agency falls short in these areas.

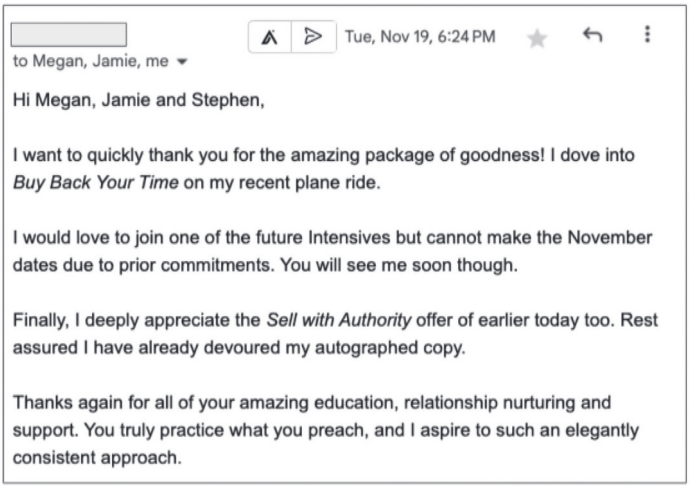
Here's the reality—audience engagement is a key ingredient in the business development recipe. And that's where this book shines: it's filled with pragmatic and actionable strategies and tactics, practical tips, and real-world case studies to help agencies improve engagement strategically and proactively.

From a personal perspective, I've known and worked alongside Jamie for the last six years. In full transparency, Predictive ROI is a client of The Expressory, and they are also a client of Predictive.

But that's not why I'm writing this foreword.

I'm writing this because we have seen the positive impact of Jamie and her team time and time again. We receive thank you emails like the one below from our clients and right-fit prospects thanking us for the thoughtful gift, the kind note, and all the ways we've made them feel special.

Candidly, none of that happens by accident.



Tue, Nov 19, 6:24 PM

to Megan, Jamie, me

Hi Megan, Jamie and Stephen,

I want to quickly thank you for the amazing package of goodness! I dove into *Buy Back Your Time* on my recent plane ride.

I would love to join one of the future Intensives but cannot make the November dates due to prior commitments. You will see me soon though.

Finally, I deeply appreciate the *Sell with Authority* offer of earlier today too. Rest assured I have already devoured my autographed copy.

Thanks again for all of your amazing education, relationship nurturing and support. You truly practice what you preach, and I aspire to such an elegantly consistent approach.

It takes a thoughtful "relationship-first strategy"—and, in my opinion (and please pardon my bias)—a wicked-smart partner to help you pull it off.

Sending thoughtful gifts and helping make your clients and prospects feel special at the right time and in the right way is only the tip of the iceberg. If you build a relationship-first strategy, you'll be well on your way to building a community—a nation of true fans. If some of your goals are to shorten your sales cycle and enhance client loyalty, building a community should be part of your recipe.

Hannah Roth, our director of strategy and mad scientist here at Predictive, likens building a strong community to growing a tree.

Hannah believes that building a community is like growing a tree because if you try to skip the roots, the tree will wither and die over time. Similarly, your tree may bend and break in bad weather if you don't have a strong trunk. If you take shortcuts when building the foundational elements of your community, it won't thrive—plain and simple.

Building a community is no doubt challenging and takes a lot of hard work. And the work has become even more complex in the last several years now that much of our business relationships are virtual, with some in-person events sprinkled in. This can make building trust, respect, and rapport harder—which, in our opinion, further necessitates a specific and thoughtful strategy.

In today's digital arena, genuine human connections that enable your audience, clients, prospects, and team to feel seen, heard, understood, and acknowledged are at risk. With so much noise,

distraction, and competition for attention—you need a unique strategy to step away from your competitors, plant your flag, and claim the ground you want to own.

In my opinion — Jamie has encapsulated the *how* in her book.

She breaks down how a relationship-first approach can help ensure that your agency puts relationships first and, as a result, builds a community that moves your agency onward to that next level.

Thanks, Jamie, for sharing your insights and wisdom within these pages. The methodology you've built will help agencies move from occasional acts of appreciation and acknowledgment to consistent, thoughtful touchpoints that create lasting emotional connections with their audience, clients, prospects, and team.

Let me close by sharing the words of another brilliant scientist, Brené Brown: "I define connection as the energy that exists between people when they feel seen, heard, and valued; when they can give and receive without judgment; and when they derive sustenance and strength from the relationship."

Wise words.

Onward with gusto!

Stephen Woessner
Founder and CEO, Predictive ROI,
and co-author of *Sell With Authority*

Preface

As I write this book, we're experiencing the dawn of the widespread use of artificial intelligence. The speed of technological advancement seems to be increasing again. We have an entire generation of people who have never known life without the internet, and the time spent behind the screen continues to increase. The landscape of human interaction and personal connection has undergone a seismic shift. We've reached a point where surface-level connections often overshadow any genuine human interaction.

And it shows.

The more technology changes the way we work, communicate, and live, the less people relate to one another. While technology has enabled us to become more digitally connected than ever, the lack of depth and quality leaves us feeling more isolated than ever. Human connection, belonging, and feeling seen are more essential

and valuable than they have ever been. Humans are social by design. We are not meant to live isolated lives. Research continues to show that there is a link between our relational and emotional health.[1]

I hope this book will inspire you to reconsider the value of relationships, not just as numbers in your business portfolio but as the foundation of your lasting success, well-being, and fulfillment.

I want to see a society where it's the norm to have compassionate leaders who prioritize relationship development. I want you to become a leader who understands the value of acknowledgment and care and wants people to feel they belong as much as they need it. And I want you to experience the life-changing results of improving your relationships overall. With this guide to designing strategic engagement in business, I aim to ignite investment in building emotionally connected relationships that change cultures for the better.

This book is more than a guide to strategic engagement in the business world; it's a roadmap for cultivating a life marked by meaningful relationships. Even if you only implement one strategy from this book, the results from that one thing will inspire you to do more. I've watched it time and time again with our clients. There is a reward in having a positive impact on someone else. Moreover, I know that when you feel that return even once, you will naturally seek more opportunities to create emotionally engaged relationships.

I look forward to watching the ripple effect of your efforts.

PART I

When Is It Time To Cultivate Relationships?

Chapter 1

Why Strategic Engagement Matters

What keeps agency owners awake at night?

The answer is finding enough *right-fit* clients.

The 2023 Marketing Agency Benchmark Survey showed that 37 percent of agency owners report new client acquisition as their number one challenge.[2]

No, this is not a result of the pandemic. A 2018 survey from HubSpot reported similar findings.[3]

However, the end of the pandemic in 2023 magnified this problem for agencies because economic fears caused delays in client conversion for so many in the industry. Moreover, in 2024, we rode the same rollercoaster of uncertainty.

The runner-up top challenge in the 2023 Marketing Agency Benchmark Survey was time constraints, with 20 percent of owners reporting stress over timelines and the pace of the industry.

Yes, agency owners wake up in the middle of the night thinking about finding enough time to maintain the business while also figuring out how to attract new clients—and not just any clients—right-fit, high-value clients.

Most agency leaders I interact with have no proactive programs for identifying prospective clients, let alone nurturing them.

What happens when the economy slows, business starts regressing, or referrals dry up? Many are left scrambling to figure out how to recover or maintain the expected business levels. No ongoing plans have been put in place to continue nurturing leads to prevent these downturns from impacting business.

On top of that, according to a 2021 Agency Audit survey, only 48 percent of agencies have any formal process in place to nurture existing clients to minimize attrition. So not only are agencies unprepared for the downturn in business, but they're also doing nothing to ensure they're limiting client defections.[4]

Here's what's even more eye-opening. Your clients are craving more from you on the relationship front. It's not enough to be good at your service and deliverables anymore. In the 2023 Agency Edge survey of 512 marketing decision-makers who work with agencies, 81 percent of the respondents said they strongly agree with wanting to work with agencies they can build strong relationships with. Moreover, 51 percent wish their agencies would spend more time getting to know their organization's employees personally. They want you to know them personally. They want a strong relationship, and most agencies have no time to plan or execute this level of relationship building.[5]

Aside from the top reported challenges an agency owner faces, something else has been softly affecting business over the last few years. Many may not yet recognize the impact it's been having, but it is beginning to rear its head, and it's time for us to pay attention to the human changes that are negatively impacting how we do business.

A Cautionary Tale For Agency Owners

It's time to take a closer look at something that has been imminent for quite some time. At the time of this writing, we are experiencing the collision of two important trends: the advanced pace of technological change and the rise of mental illness in our country, which have begun to disrupt the fundamental practices many of us have been using to conduct business.

Since the early 2000s, we have seen a surge in digital innovation, transforming how we conduct business, communicate, and build relationships. From emails, smart devices, and social media, instantaneous messaging enables connections across borders and with the masses.

But these advancements have come with challenges, particularly on the mental well-being front. Technological advancements shift the way our businesses operate, the way we work, and how people work with us. We may not be aware of how it's changing us as individuals and affecting how we build relationships with prospects, existing clients, and even our teams.

When the world shut down for COVID-19, technology helped us cope and kept us moving forward. However, coming out of that global experience, we live in constant streaming and always

"on" behaviors. These changes have started to fuel the release of alarming statistics about the decline in our mental well-being.

In early 2023, the United States Surgeon General released an advisory about the epidemic of loneliness. At this time, one out of two US citizens feels isolated and disconnected, with overall consequences as harmful as smoking fifteen cigarettes daily. If you look closely, you're sure to see how subtly, or maybe even dramatically, this has an impact.[6]

The Constant Connection Dilemma

Pew Research shows that in 2021, 31 percent of adults reported going online "almost constantly." The study reports that 85 percent say they are online daily.[7] This constant connection habit impacts us in multiple ways.

Information Overload: With access to more information than we'll ever have time to consume, much of it being pushed at us in the form of alerts and headlines, we've developed coping mechanisms. The constant flow of content overwhelms, causes stress and anxiety, and leads people to block or ignore.

Loss Of Focus. Humans aren't designed to multitask, even though society tells us some of us are good at it. When we're juggling between all the things, with constant interruptions, our brains aren't multitasking; they're switching tasks. This frequent switching is resource-intensive. It can take from twenty to thirty minutes to refocus each time you switch a task. All this extra switching leads to mental fatigue and reduced concentration. And let's face it—feeling busy doesn't always equate to productivity. With the increase in apps, platforms, and productivity tools, it's

easy to feel like we're making progress when we're achieving very little. The constant juggling and lack of actual productivity create heightened stress levels and burn people out.

Fear Of Missing Out (FOMO). Constant connection and comparison have led to an increase in fear of missing out. It's anxiety that leads to feelings of isolation—feelings of not belonging and not being part of a community. Isolation creates feelings of depression and eventually impacts our ability to relate to others.

Too Much Virtual. Virtual has become mainstream, leading to fewer face-to-face interactions overall. This lack of regular human interaction prevents connections with depth, trust, or relatability. A UCLA study found that students who went five days without technology were significantly better at recognizing emotions in others and better at relating. Imagine the long-term impact on our businesses as we hire more people with limited ability to relate personally.[8]

Negative And Harassing. Our digital universe has become a playground for negativity, bullying, harassment, and fraud. The constant need to be vigilant can cause overwhelm, and the negativity fosters anxiety. For people already feeling disconnected, any of these experiences directed at them can cause further feelings of isolation and lack of belonging. It perpetuates the desire to stay disconnected.

Reduced Downtime. In generations past, waiting for meetings to start, commutes, and even lunch were seen as downtime. Time to step back and recharge for a few minutes. It's time we weren't thinking about work or to-dos. These moments are now filled with checking emails, responding to customers, and skimming social

media. There is no downtime. We can't even wait at stoplights without the urge to quickly read an email (or is that just me?). When there is no time to recharge, we live in constant exhaustion. Our capacity is always reduced.

Understanding the digital world's impact on society's well-being will be essential for business leaders to continue their growth in today's connected environment.

Why This Matters For Agency Owners

Digital marketing and social media platforms should make staying top-of-mind easier. However, our businesses exist in competitive and disruptive digital marketplaces where prospects, clients, strategic partners, and even our employees lack focus and are bombarded with more brand messaging than ever.

Many business relationships are now conducted 100 percent virtually, and working virtual or hybrid is the norm. Unfortunately, a virtual connection does not equal a personal connection, so trust takes longer to evolve.

In this new digital era, the genuine human connections that enable people to feel seen, heard, understood, and acknowledged are at risk. The decline in our mental well-being is starting to erode our businesses' marketing, sales, and company cultural efforts, whether we recognize it or not.

With so much noise, division, and negativity, how does a brand stand out and create loyalty? How can it cut through the constant barrage of headlines and information to capture attention? And

how do you become the best-in-class service provider that earns regular positive word-of-mouth recognition?

Bob Burg first used the "Know Like Trust" phrase in his book *Endless Referrals*.[9] For years, we've lived by this concept, understanding that people need to know, like, and trust us to do business together. I believe that today's high-tech, socially disconnected world is about to have trouble moving beyond the "Know" part of that equation. I suspect many are already feeling the impacts without understanding why.

Here are a few of the ways this shows up in business:

Prospect Relationships. You may have noticed that your sales cycles have been increasing. We've heard all about it from the business leaders we talk with. And it's not surprising. When people feel disconnected, they are not likely to give up their trust so easily. They are suspicious and guarded. They want to know they are more than just a number to another company. They want to belong and feel seen.

Customer Relationships. If our over-reliance on the digital has negatively impacted how we relate to others, then that means the people engaging with your existing clients may not be great at it. Do they know how to make someone feel seen, heard, understood, and cared for? Are they listening the same way and acknowledging what they hear? It's unfortunate, but many of the basic people skills that were once common are a struggle these days.

If clients feel disconnected in general, they will question their importance to your business on a more frequent basis. They will question their initial purchase decision longer than they may have

in the past. Remember, they are always online and frequently hear stories about how others are being served. They hold businesses to higher standards than ever before—because they can.

Referral Partners. Chances are that you're probably experiencing a lower rate of referrals as well. Strategic partners are not as inclined to stick their necks out there to make as many introductions in a world where they feel disconnected, constantly judged, and often more guarded overall.

It's no secret that social media has created monsters out of people who would once keep their comments to themselves. People are more cautious about who they vouch for because they want nothing to do with what happens.

Remote Employee Performance. If employees feel disconnected from the company, they have limited job satisfaction and are not contributing as much as they could. They may not even realize what's driving this disconnection.

This same isolation could cause problems with team dynamics. Strong teams are built on trust and understanding, and if remote employees don't have enough engagement to build that bond, the lack of interpersonal relationships will lead to less collaboration.

As the Surgeon General points out in his advisory, "Our individual relationships are an untapped resource."[10] As I shared in my *Forbes* interview with Henry DeVries, shifting from a focus on transactions to deeper relationships will provide the foundation that businesses will need to thrive going forward.[11]

This is where strategic engagement becomes a necessity in your marketing strategy. Based on our work with business leaders and research with other agency owners (along with financial service providers, attorneys, and more), we've developed a methodology rooted in social psychology, storytelling, and good old-fashioned manners for better relationship building.

When you have a strong engagement strategy, you are actively listening, engaging, building trust, and recognizing the relationships that support your business. These consistent actions are what create an emotional connection and, ultimately, loyalty. When you have relationships with strong emotional loyalty, you have people who love everything about you—and they tell everyone they know.

I witnessed this firsthand growing up. My grandfather ran a flower shop for forty years in our small town. Before the dawn of digital marketing, building genuine relationships and a solid reputation in your community was a business's most valuable form of currency. He showed me how to build a business when customers found you because they drove by your store or heard about you from a neighbor or friend. A time when success depended on the relationships made with people in the community.

When I was nineteen years old, I began my journey in the highly male-dominated field of IT. As a young minority woman, I was invited to a lot of tables. However, I quickly learned which tables wanted my voice. It took a while to develop that sense of belonging in a world that wanted to speak over you or looked at you as less than. Over time, I drew on my experience of always being helpful to others to create the relationships that helped me navigate my success at that company.

In the early 2000s the working world experienced the most dramatic shift I had witnessed to that point in my career. It started with the introduction of smartphones and the expectations employers placed on employees thanks to this continuous connection. Our decreased work/life balance and the changes in our relationships revealed the first instances of mental illnesses I encountered when I had to watch a colleague take a mental health leave of absence. Management told me that I would be surprised at just how many people were medicated to cope. Maybe I should not have been, but I was.

These changes led to underappreciation and unrealistic expectations of employees when their contributions should have mattered most. People no longer went out of their way to help or make things right. The hardworking people I grew up with in the corporate world suddenly lost their interest in fighting the uphill battle for what was right in their day-to-day jobs.

Between 2008 and 2012, I experienced a divorce, the traumatic closure of a business we shared, and the unfortunate corporate job assignment under a manager who was a bully. My personal and professional sense of belonging and worth were stripped bare. I became another one of the medicated and disengaged. A disconnected being who couldn't figure out how I landed on that path.

The complete disregard for people and relationships suddenly became a standard in almost every aspect of my world. I realized something was fundamentally broken with how we treat each other, and it wasn't just a corporate world problem. It was a societal issue that I had to start addressing for myself and my children's future.

That change started with leaving the corporate world and beginning my journey into business ownership, where I could create the culture I had experienced growing up.

I realize now that I still see things at a human level first. I find it difficult to watch when people are not treated as humans, when they are a means to someone's end or just another transaction. People deserve to be recognized, to feel appreciated or acknowledged for their efforts, to feel supported, and to belong. Some of my greatest regrets are the missed opportunities for kindness that I feel I should have been more determined to see through.

Our environment today is causing many missed opportunities for kindness. I think we can change that in our business world.

But getting there takes planning. At my company, The Expressory, we have developed a methodology to design strategic engagement that incorporates best practices in social psychology. It consists of understanding the categories of relationships critical to growing your business, doing deep research, and understanding what's important to the contacts you identify in those categories. Also important is designing touchpoints that acknowledge what those contacts find valuable or help them be better at what's important to them, consistently executing those touchpoints, and analyzing the resulting engagement.

Our methodology enables you to go from occasional acts of appreciation and acknowledgment to consistent, thoughtful touchpoints that create lasting emotional connections that have long fueled business success and created magnetic cultures. Regardless of technological advancement, human nature craves belonging

and understanding. A relationship-first approach helps ensure you care enough to see the person at the core of the relationship instead of the transaction.