FUNNEL AGENCY STACKED REVENUE GUIDE

HOW TO KEEP YOUR FUNNEL AGENCY CLIENTS PAYING YOU

(MONTH AFTER MONTH)

Hi, I'm Mikael Dia, and I help digital marketers shift their mindset from selling individual marketing services to creating scalable funnel marketing agencies.

I have built three 7-figure businesses in three vastly different niches, including my Funnels as a Service (FaaS) Agency, White Coat Digital.

Every one of those businesses had to get their first few clients, then build on that success to scale to over a million dollars a year in new and reoccurring client work – and that means I needed to learn how to optimize funnels for success as well as retain existing clients and keep them excited to work with me.

Once you have established a niche, started to attract and close your dream clients, and learned how to systemize your funnel delivery process so you can churn out high-quality funnels faster than ever… do you really want to just deliver the funnel and be done?

Of course not!

The best way to create steady, predictable income for your business is to retain your hard-earned clients month-over-month with optimization and traffic packages.

I designed the **Funnel Agency Stacked Revenue Guide** to give you a clear set of steps for optimizing funnels, retaining happy clients and taking it to the next level inside your FaaS Agency.

THE KEY TO SCALING YOUR AGENCY

When I first started my FaaS Agency, White Coat Digital, we were just selling one-off funnel builds. I would build one funnel for a client and then move on to the next, without worrying about what happened once we handed off the funnel.

I had not built a system to retain clients month-over-month… and my income fluctuated constantly as a result.

The problem with building funnels without a plan to retain those clients is that you have to constantly be selling new funnels in order to keep money coming in.

And even if you have a niche, a systemized agency and a delivery process that allows you to churn out funnels, you have to keep going through the Planning and Blueprint process and learning everything about a new client and their business…

While someone else gets the month-to-month retainer to run traffic and optimize the funnel you put all that time and energy into building.

The best way to create stability, consistency and predictability in your business is to keep the clients you already have around on a month-to-month retainer by giving them excellent results from their funnels.

It's the only thing that will allow you to scale, to hire a team, and to be able to step away from your business.

And it's much easier said than done.

Building a funnel isn't easy, and turning traffic into profit takes time, tweaking, experimenting and analysis. You need to be able to look at the data and see what is working and what is not, where the breakpoints are, what your conversions are from step to step.

But the truth is that results = retention. Results are the only thing that matters.

Whether you have guaranteed a certain number of results as part of your funnel build or if you set up your package to have an ongoing retainer for traffic and optimization, the way you handle the launch and optimization phase is going to make all the difference in whether or not you're going to retain your client month-over-month.

That's why it's important that you set clear expectations with your client about what to expect from the optimization process.

Funnel optimization doesn't happen overnight. You might turn on traffic and get great results right away, but it's pretty unlikely. It usually takes time to optimize a funnel to the break-even point and then to profit.

That's why I recommend that you sell your retainer package with a three-month minimum commitment for your client – that way your client understands that this is a process that may take a little time to work.

You've based their funnel on other successful funnels and given them the best possible chance of success right out of the gate, but until you run traffic and start collecting data, you can't really know how well your message will resonate with your client's audience.

OPTIMIZE WITH DATA

The key to optimizing any funnel is data. If you don't base all of your decisions on actual data, you are just stumbling around in the dark.

That's why it's important that you set up tracking and analytics as part of your build process.

Without it, you won't ever really know what's happening – and if you aren't making data driven decisions, you are not setting yourself or your client up for success.

I don't know about you, but I hate spreadsheets. I really hate them.

And I hate them even more when they're spreadsheets full of data that I have to parse to figure out what is happening in my funnel.

So needless to say, I have a love-hate relationship with Google Analytics, which is the go-to tool for most funnel builders who need to know how their funnels are performing.

Having all that data at my fingertips is great…

But there's actually so much data in Google Analytics that it's easy to get lost in the details and have trouble digging out the most important

information about your funnels – where traffic is coming from, where it is going, and where you are losing people along the way.

That's actually why I built my funnel planning and analytics company, Funnelytics. I hated trying to figure out what was happening from Google Analytics or the inadequate data that funnel building platforms gave me so much **that I built an entire business just so I could have clean, visual data maps that would actually help me optimize my funnels.**

I'm not going to turn this into a huge Funnelytics pitch right now, but if you're struggling to extract important data from multiple platforms about your funnels, if you hate spreadsheets, if you want clear, easy-to-read reports that will not only make your job easier but will also wow your clients… you might want to check out what Funnelytics can do for you.

Whatever platform you use for analytics, the data is incredibly important.

So at the very least, you need a system for getting clear, actionable numbers that you can use to make informed decisions at each of the five stages of the funnel optimization process.

5-POINT FUNNEL OPTIMIZATION PROCESS

Every time I start to optimize a funnel, I follow a 5-Point Funnel Optimization Process. I use this process over and over again, in sequence, for as long as I am optimizing that funnel.

One of the things that a lot of people who sell Funnels as a Service don't understand is that, when it comes to optimization, you always want to start from the actual conversion point and work backwards. A lot of people will start with the ads or the sales page, but I never do.

I work from the sale backwards, so my optimization process looks like this:

1) Conversion Point Optimization

2) Sales Mechanism Optimization

3) Follow Up Optimization

4) Lead Gen Optimization

5) Ad Optimization

That way I always know that the conversion point has the best chance of converting based on my current data before I start increasing traffic to my sales page.

I'll break each of these five points down for you, followed by a graphic that shows how the whole optimization process works.

CONVERSION POINT OPTIMIZATION

Whatever your conversion looks like, whether it's a standalone application or a product that has a bump, upsells and downsells, the faster you can optimize this part of your funnel to get more conversions, the more money your client is going to make… even if you don't change anything else about your funnel.

So always look at your conversion point first and see if there's anything you can do to reduce friction or entice customers to buy or apply.

This can include things like adding testimonials to your application page, adding a guarantee to your cart, increasing your cart value, or adding videos to your upsell or downsell to make them a little more engaging.

SALES MECHANISM OPTIMIZATION

Next up in my 5-Point Funnel Optimization Process is the Sales Mechanism. This is my sales page, webinar or mini-class – whatever I'm using to educate my traffic and funnel them toward the final conversion goal.

If people aren't clicking through to your cart or application, you know that something about this page isn't engaging people properly.

Start optimizing this page by split-testing headlines, your call to action, your videos, the flow… anything that might be adding friction to the customer's progress to the cart.

FOLLOW-UP OPTIMIZATION

Now it's time to take a look at your follow-ups – every place where you are following-up with a potential customer who has already come into your funnel.

This can include everything from your email sequences to bots to your retargeting ads… though you want to make sure you're only looking at your retargeting ads at this point, not all of your ads.

Check to make sure that you have reduced friction from all of your follow-up sequences to your sales page and that you aren't losing people because the call to action isn't clear.

Also make sure that nothing is causing confusion between what people are seeing in their email or retargeting ad and the page itself – if the page they land on after they have clicked through doesn't make sense, they will bounce quickly.

LEAD GEN OPTIMIZATION

The second to last step is optimizing the opt-in page that you use for lead generation. Whether you are using a simple webinar sign up page or collecting emails in exchange for a free lead magnet PDF, this page is the gateway for your traffic.

Make sure to test anything that may cause or remove friction, including headlines, form details, and how much information is on the page.

Increasing the conversion rate of this page is going to increase traffic through your entire funnel, so it's important that you are paying attention to what the data is telling you here.

AD OPTIMIZATION

Last but not least is Ad Optimization. This is where a lot of funnel builders and traffic managers START their optimization process, and that is the biggest mistake they can make when it comes to optimizing their funnels.

Ads are where your client is actually spending money, which makes you want to pay the most attention to them – every dollar is precious when you are trying to retain a high-ticket client and keep them paying you month-over-month.

But unless you just aren't getting any clicks at all, your ads should be the very last thing that you optimize because the focus should be on converting the traffic you do get.

If your client makes $500 every time they sell their product, they aren't going to care about their cost per lead as long as they're getting new customers and making more money than they're spending.
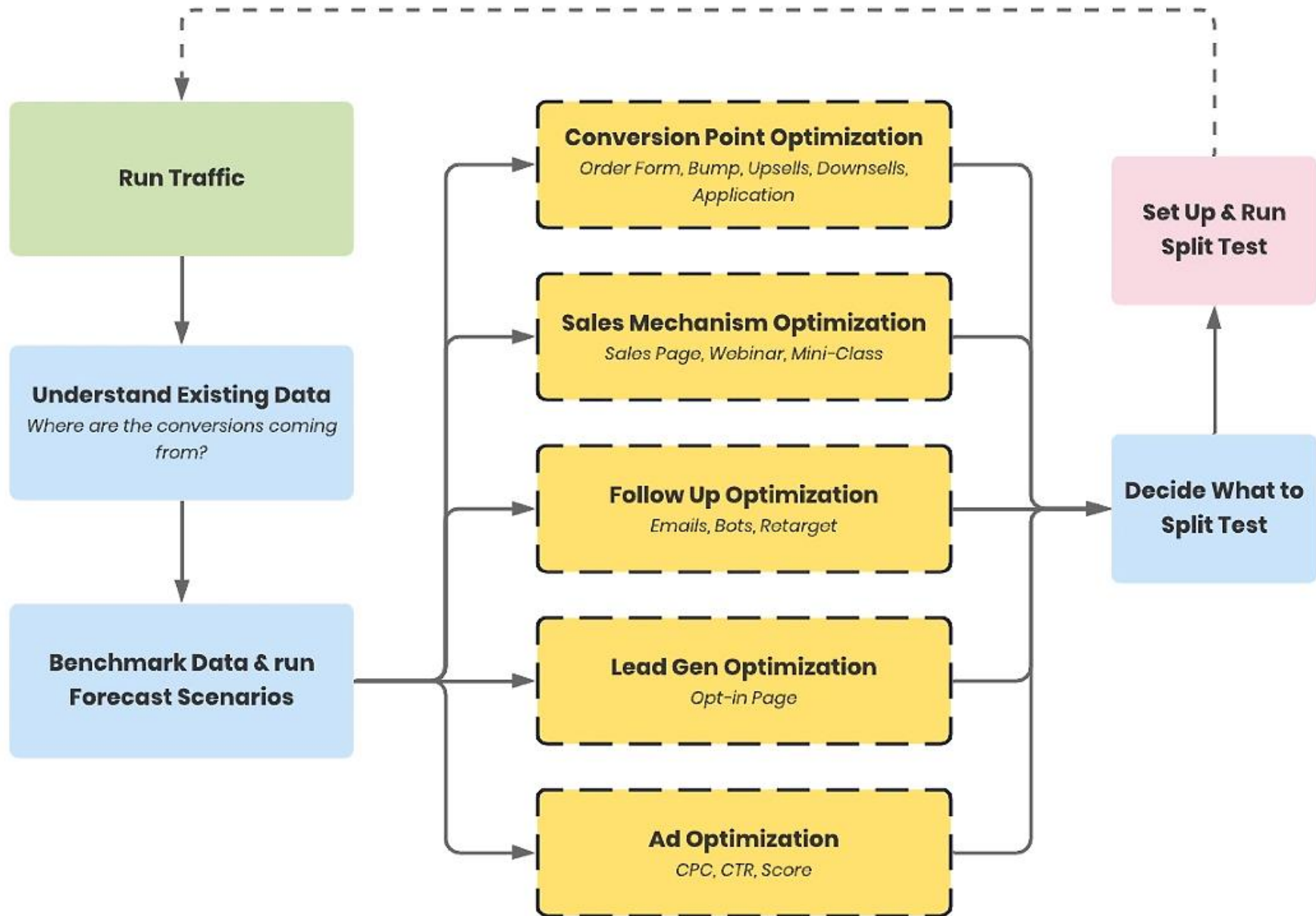
And if you focus on optimizing from the conversion point backwards, you know that you're working toward every paid click having a higher probability of converting.

Once I've gone through this entire process, I can make a list, decide what to test, set up my split tests and gather more data… then start the entire process over again.

And that's why the monthly retainer system works, because theoretically you can go through this process, keep gathering data, keep optimizing the funnel and keep sending traffic indefinitely.

Check out the graphic below to see exactly how my funnel optimization process works, then use the checklist on the next page to plan your own optimization process.

5-POINT FUNNEL OPTIMIZATION PROCESS

Run Traffic

Understand Existing Data
Where are the conversions coming from?

Benchmark Data & run Forecast Scenarios

Conversion Point Optimization
Order Form, Bump, Upsells, Downsells, Application

Sales Mechanism Optimization
Sales Page, Webinar, Mini-Class

Follow Up Optimization
Emails, Bots, Retarget

Lead Gen Optimization
Opt-in Page

Ad Optimization
CPC, CTR, Score

Decide What to Split Test

Set Up & Run Split Test

THE FUNNEL OPTIMIZATION CHECKLIST

STEP 1: CONVERSION POINT

- ☐ Is your order form conversion rate at least 10%?
- ☐ Can you increase Cart Value by adding an Order Form Bump, Upsell or Downsell?
- ☐ What steps can you take to increase your conversion rate?

STEP 2: SALES MECHANISM

- ☐ Is your Sales Mechanism (sales page, webinar, mini class) conversion rate at least 1%?
- ☐ What steps can you take to increase your conversion rate?

STEP 3: FOLLOW UPS

- ☐ Are you following up with retargeting ads and emails?
- ☐ Are your emails getting at least a 1.5% click through rate?
- ☐ Are your retargeting ads getting at least a 1.5% click through rate?
- ☐ What steps can you take to increase your click through rate?

STEP 4: LEAD GENERATION

- ☐ Can you streamline the lead generation process?
- ☐ Is your Opt-in Page conversion rate at least 25%?
- ☐ What steps can you take to increase your conversion rate?

STEP 5: ADS OPTIMIZATION

- ☐ Is your messaging between your ads and landing page congruent?
- ☐ Is your ad CTR at least 1%?
- ☐ What steps can you take to increase your click through rate?

SPLIT TEST, SPLIT TEST, SPLIT TEST, SPLIT TEST

I don't want to spend too much time talking about split testing every part of your funnel, because if you're reading this you probably already know how important split testing is.

The bottom line is this: split test everything you can.

Whether you do an A/B split test or run one variation and then another to the same amount of traffic, the only way you can get clear data about the optimization process is if you have a control.

Without that benchmark and the data that it provides, you will never know if you are actually moving your funnel in the right direction – toward more conversions and more sales for your client.

Inside FaaStrack we dig deep into the importance of data-driven decisions and how to use Funnelytics to help you decide where to focus your optimization efforts… so if this is an area where you could use some help, you may want to check out the FaaStrack Program.

But again, no matter what analytics you use to make your decisions, I highly recommend that you build the ability to split test into your funnel from the very beginning – especially if you are planning to sell your client on a month-to-month retainer.

That way you can use the data, your optimization plan and information from your split tests to show your client the progress you are making.

Because trust me, your clients are going to want to see progress or they're not going to be happy.

And if they're not happy, you can kiss that steady retainer goodbye.

3 STEPS FOR KEEPING YOUR CLIENTS HAPPY

If you want to have a successful FaaS Agency that can grow and scale, nothing is more important to the process than happy clients.

Honestly, that's the biggest reason that I systemized my agency and why I'm teaching digital marketers and funnel builders like you to do the same.

Happy clients = monthly retainers, added value and positive reviews.

Unhappy clients = stress, misery and high-ticket refunds.

If I had been able to keep clients happy and scale my business while selling whatever to whoever, you wouldn't be reading this right now.

I would never have created the pillars for running a FaaS Agency like an assembly line… I wouldn't have built Funnelytics… and I definitely wouldn't be helping people do the same for their agencies inside the FaaStrack Program.

Client happiness is the key to being able to build and scale your FaaS Agency in a sustainable way, from the initial funnel build to retaining clients month-over-month.

And keeping your client happy boils down to these three core things:

1) Communication
2) Easy to Understand Reporting
3) Showing Progress

If your client isn't happy, chances are you aren't doing a good enough job in one of these three areas.

You may be communicating and showing progress, but your reporting is hard to understand. You might be delivering regular reports, but your client isn't seeing progress. And worst of all, you may not be setting or meeting your client's expectations about communication, which is sure to cause issues across your entire funnel build process.

It is important to listen to what your client is saying to you when they are addressing issues or unhappiness with your progress, then take action quickly to fix that issue.

If you don't, your client is going to be unhappy, you're going to be stressed out, and you are not going to get the retainer that will smooth out your monthly income and allow you to grow and scale.

I'll talk about each one of these three issues below, with some tips and tricks for how to keep your client happy and on track.

COMMUNICATION

Establishing a regular communication schedule with your clients is one of the best ways to head off problems before they start.

From the beginning of your relationship with your client, it's important that they have clear timelines for when they should expect to hear from you and when they should expect to receive deliverables and reports.

Establishing clear expectations and timelines is often enough to head off communication issues in the future… and to keep your client from constantly reaching out for updates on the progress of their funnel build or optimization process.

Nothing destroys trust faster than completely missing a deadline without giving your client a heads up. If you take a few minutes to reach out and be transparent with your client about what is happening and what their new expectations should be, most clients will be fine with the delay.

But if they have to reach out to you, it erodes their trust in your process and professionalism, which can cause a lot of issues along the way.

When you do talk to your clients, whether via email or on the phone, make a point of listening to what they are saying to you.

Don't just read the email, throw off a quick response and file it away. The tone and the frequency with which your client communicates with you can tell you a lot about how happy they are.

Learning to read these subtle cues can be the difference between heading off issues before they happen and having a client completely blow up at you and demand a refund.

If your client is sending multiple emails a day, if they're expressing unhappiness at the lack of sales, if they're concerned about their cost per lead… even if the emails are worded nicely or express trust, these are indications that your client is unhappy.

Acknowledge these hints when you are communicating with your client, show them how your current plan will address their concerns, then take action.

Your client will be back in the happy column in no time.

EASY TO UNDERSTAND REPORTING

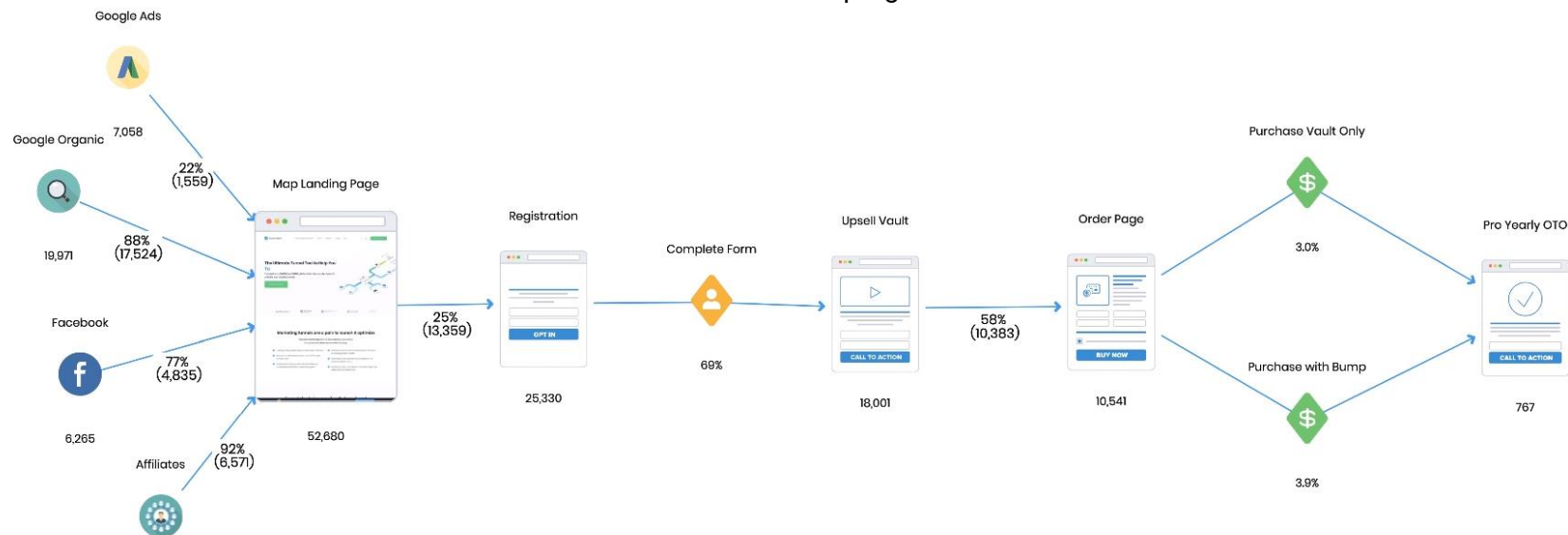The second step of the client happiness process is **easy to understand reporting.**

During the build process, reporting is easy. You have a timeline, you have deliverables, you send those deliverables to your client on time. They approve them or ask for changes. You keep moving forward.

But once you get to the traffic and optimization phase, reporting stops being about deliverables and starts being about data.

Remember earlier when I said that I really hate spreadsheets? Well, I'll be honest with you… there is one person who hates spreadsheets more than me.

Your client.

Nobody is happy when they get a report and it's just a bunch of random numbers with no real context.

And even if you provide the context, nobody wants it to be hard to understand what's happening with their funnel.

Your client has paid you a lot of money to build and optimize this funnel, so it makes sense that they want to know how it's working and what your plans are to make it better.

Not to pitch Funnelytics again, but I designed this tool to make it as easy and visual as possible for both you and your client to know what is happening in their funnel at any time.

Data is reported on a clear, easy-to understand funnel map that only shows the most important funnel metrics, which makes reporting a breeze (see screenshot below).

But even if you don't decide to use Funnelytics, I highly recommend you find a visual way to report on the Key Performance Indicators (KPI) of each part of your funnel, including ad spend, click through rates, and conversion rates.

The more you can strip down reporting into a clear, visual process, the easier it is going to be for your client to understand what you are doing to optimize their funnel.

And that leads us to the last step to client happiness – showing progress.

SHOWING PROGRESS

Reporting is obviously a big part of showing progress, but you actually have to MAKE progress to have something new to report.

This is where benchmarking your data, setting goals, and using the 5-Point Funnel Optimization Process becomes important.

What you want to be able to do, week over week, is show your client that you have made steady progress toward the goals you have set for the funnel. You also want to be able to show them how the needle is moving, what you intend to focus on next, and why you are making those actions a priority.

This is a place where Forecasting your KPI data really shines – it gives your clients the chance to see the actual data behind why you are making certain decisions about their funnel.

It also lets you show your client exactly why you are focusing on certain parts of the funnel over others… so when they are concerned about their ad spend, you can use actual data to show them how increasing their opt-in rate will be the most effective way to drive down their CPA.

Forecasting your results is as simple as taking your actual data and showing what will happen to each part of the funnel if you optimize certain metrics for better performance.
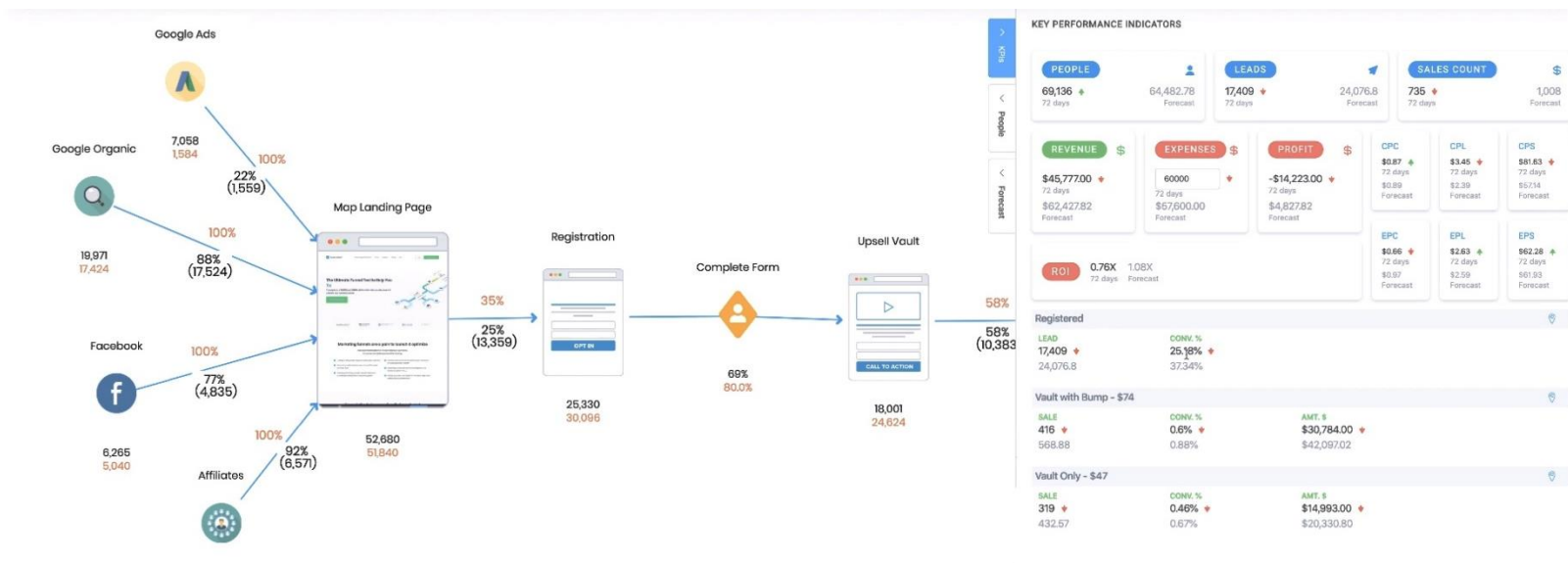
For example, if your conversion rate is currently 5% on your cart page, with 3% buying the upsell and 2% buying the downsell with your current amount of traffic… what will happen if you can increase that cart conversion rate to 10%? Your client will double their profits without making any changes to their ads or the rest of the funnel, right?

Being able to show the data behind your decision making is a great way to assure your client that you are working hard to convert more strangers into customers for their business.

By the way, Funnelytics is great at this. It includes handy forecasting features that let you test different scenarios easily and spit out clear data maps that look like the screenshot at the bottom of this page.

But whatever you use, **being able to forecast possibilities to your client based on real data and then taking action** is the best way to show your client real progress toward your traffic and optimization goals… and that is going to make your client very happy.

And happy clients mean steady retainers, which builds stability in your business and lets you take it to the next level.

TAKE IT TO
THE NEXT LEVEL

Now that you know how to:

1) Run your Agency like an Assembly Line

2) Find and Attract Dream Clients

3) Close them for High-Ticket Prices

4) Systemize your Funnel Delivery Process and…

5) And Keep your Clients Happy so they'll Keep Working with You

Let's about some of the other things you can do to transform your FaaS Agency and grow your income from individual clients beyond the fees you charge for funnels and ongoing work retainers.

First, I want to share some ways you can upsell your clients and increase their value to your agency.

Then we'll talk about establishing revenue share deals with your best clients.

UPSELL & INCREASE CLIENT VALUE

The process you started by adding a traffic and optimization retainer on top of your funnel build fee is only the tip of the client value iceberg.

If you want to make the most of all the hard work you put in to getting to know your client's business and increase their value to your agency, you need a plan to upsell and continue to extract revenue from your clients.

Your goal is to have an ongoing relationship with your client… one that never ends. That means you're constantly doing new stuff for them.

So now is the time to think about other ways to increase revenue from your clients.

Things you can offer include:

▶ Another funnel that fits within your assembly line framework

▶ Building a related upsell or a backend funnel that can increase their revenue

▶ Building out an additional traffic source for their funnel

▶ Running one-time promotions to leverage the list you've built and generate a win, like a Black Friday Promotion

▶ Partnering with other agencies to provide services they might need that you don't offer, like SEO, social media management or website building.

If your client needs something, whether it's creating a course or building a new website, they are going to pay someone to do that work for them.

If you can take on that work – even if you outsource the work to a trusted contractor and just project manage the process – you are going to increase your client's trust and dependence on your services while also increasing their value to your business.

Even if there's nothing your client wants or needs right now, you can always ask them to give you a testimonial or to send other clients your way.

There's nothing stronger than a case study to prove that you are an expert in your field, so if you are getting excellent results for your client, make sure to leverage that into something you can use to attract additional clients in the future.

REVENUE SHARE

And last but not least, one way you can leverage existing client success into more money for your agency is to enter into a revenue share deal with your best clients.

When you work with a client for a while and have built a really good, successful relationship with them, it makes sense to ask for a way that you can share in the revenue that you are generating.

Because let's face it, if you're helping a client generate more and more income and they keep paying you a flat fee that doesn't reflect that income growth, your incentive to keep helping them goes down.

That's the perfect time to structure a revenue share deal, which can make a world of difference to your agency.

It's important to note that the only way these deals really work is if you get results first. You can't just go to a new client and ask for 10% of their sales unless you've got an insane track record and you're highly in demand.

And you also don't want to offer revenue share deals unless you're sure you can get results, because using a revenue-share model to build a funnel can end up with you doing a lot of work for very little (or no) money.

You need to get results first.

Once you are getting consistent results for your client and you can prove that their company is growing from your work, you need to ask yourself a very important question:

Do you WANT to become partners with that person and that business?

Revenue share deals are partnerships, and once you sign that deal it's your job to work closely with the business owner to figure out how to become even more successful.

You'll no longer be just a FaaS Agency on contract with their business, you will become their Chief Marketing Officer. It will be your job to strategize and take action on everything you could possibly do to continue to grow their business as rapidly as possible.

So make sure you're only offering this kind of deal to business owners who you like and know you will be able to work closely with for the long term.

Once you've decided that a business is a good fit for a revenue share deal, it's time to enter into the negotiation phase.

And it is a negotiation. You and the business owner are going to have to sit down and figure out the specifics of your revenue share deal.

You'll need to answer questions like:

▶ What percentage will you be getting from the revenue share deal?

▶ What products and sales are included within the revenue share?

▶ Are there any deductions from gross sales that have to happen before you get your percentage of revenue (affiliate commissions, ad costs, product returns, payment processing fees, etc.)?

▶ What are your responsibilities inside this deal? What service are you providing and what is you scope of work?

▶ If you are going to need a team to execute work for this client, who pays for the team members? You or your client?

▶ If your client decides to sell their business, will you get a percentage of that sale? How is that structured?

Once you have hammered out the details to everyone's satisfaction, you will need to have a contract drawn up by a lawyer.

Inside the FaaStrack Program I break down the full contract and process I used while negotiating a 10% revenue-share deal with one of my 7-Figure clients – and share that template so that members can use as a starting point – but no matter what you will need to get a lawyer involved eventually if you want this contract to be legally binding.

Only you can make the decision to become partners with a business owner and start a revenue-share deal, but it's important to understand that it will fundamentally change your relationship with the business owner if you do.

From that point forward, your client will stop treating you like a contracted agency and start treating you like a partner in their business. The day-to-day expectations on your time and availability will definitely be higher.

You should expect to be communicating more frequently, having to jump on brainstorming sessions with the business owner, and helping steer their company into the future.

But there's a lot of upside to that, because you also get to participate in and financially benefit from the growth of their business.

NEXT STEPS

The ROI of reading this, nodding along and then just sticking it in a reference folder somewhere and forgetting about it is ZERO. Nada. Nil. The only way things will change in your agency is if you change them.

This is the fifth part of a masterclass that I've created to give you the keys to building a sustainable FaaS Agency. It's on you to use the tools you've learned to systemize and scale your agency.

Just in case you missed one of the others, you can get them right here:

- The FaaS Playbook
- Funnel Client Attraction Cheatsheet
- The High-Ticket Funnel Shortcut
- The Funnel Services Blueprint

But while we're still talking about transforming the way you manage your business…

If you want to skip the months (or even years) of figuring out how to systemize your agency and what tools you need to get the job done, you might want to check out the FaaStrack Program.

FaaStrack is designed from the ground up to teach you how to systemize your business and get incredible results for your clients while stepping away from the day-to-day… and it provides all the tools, templates and support you need to get to the next level FAST.

It's the ultimate shortcut to building and scaling your Funnel Marketing Agency.

If you're interested in seeing exactly how FaaStrack can transform your marketing agency, **pop on over to find out more about the program.**

Then, if you think it's for you, we'll jump on a call and talk about how FaaStrack could benefit your agency.

LEARN MORE ABOUT FAASTRACK