

benchmarking your firm's performance: november 6, 2018

room for only
24 attendees

a yearly firm-altering seminar from
recourses: david c. baker
nashville, espaces (coolsprings), november 6, 2018



a gathering of disciplined + courageous + intelligent agency leaders



eager to be understand their businesses and impact the direction



to pull ahead of the pack. like you are.

A core belief that informs my advisory work with independent, expert marketing firms is this: **firms fail or thrive based almost entirely on the quality of their business decisions.** Being creative and cool is of great value, but unless your business is run on sound principles you're not going to be around long, and your actual and potential clients won't benefit from your expertise.

I ran my own firm for six years and struggled with finding and implementing those fundamentals. In fact my entry to the consulting world came when Cam Foote of Creative Business asked me to author various articles related to understanding the financial elements of running an agency. I then

adapted a few ideas from the late George Johnson of The Yellow Sheet and the late Tony Mikes of Second Wind Network, but most of it came from researching the business standards in other verticals within the professional services sectors (architects, lawyers, engineers, etc.) A highlight of my career came when David Maister, the leading consultant to the legal profession, asked if he could include my work in his last book.

The next step was researching actual results from hundreds of agencies and building it into a system. After codifying that, I then licensed the IP to leading software providers, and then wrote a bestselling book called "Financial Management of a Marketing

Firm," released by RockBench Publishing Corp.

This unique seminar takes this further with additional research and the advanced element of prioritizing what you should watch and how to close the performance gaps. This is one of those boring topics...unless it's your money or your job! And in that case you'll finally find authoritative information about the business side of creativity.

After leading with this benchmarking data and a

clear explanation of how to apply it to your situation, we'll also cover some important aspects of agency management.

We'll examine how to manage and fund growth. How much growth is safe? What are the signs that growth is out of control? How do you tame it? How do you prioritize growth decisions? Where does the money come from? How far out should the troops be from the supply lines?

We'll look at employee compensation, benefits, and incentives. Without critical guidance from you folks, managers lack the guidelines that help them make smart decisions in the short-term that won't cripple the firm in the long-term.

We'll evaluate the best software solutions to run your firm, from accounting to project management to timekeeping.

And finally, we'll focus on the processes that every firm can adapt to preserve their commitment to quality, profit, scalability, and a favorable client experience.

This has typically been our most attended seminar, and I'm looking forward to offering it in revised form after a hiatus while the

research was updated. It also coincides with our recent switch to a "public benefit corporation" with a significant commitment to education and teaching.

I hope you can join us in Nashville on Tuesday, November 6. We've priced it so that most anyone can come.



the right data + the right discipline = remarkable results

TUESDAY, NOVEMBER 6

- 9:00 to 9:30 Introduction + Introductions
- 9:45 to 10:45 Crafting Industry-Standard Financial Statements
- 11:00 to 12:30 Measuring and Tracking the Benchmarks that Matter Most
- 12:30 to 1:30 Lunch Break, On Your Own with Fellow Attendees
- 1:30 to 2:00 Managing and Funding Growth
- 2:00 to 2:30 Structuring Employee Compensation, Benefits, and Incentives
- 2:45 to 3:15 Software to Run Various Aspects of Your Firm
- 3:15 to 4:00 Profit-Based Systems for Profit, Quality, Scalability, and Client Experience

PRICE

\$1,200 per attendee (strict limit of 24 attendees)

Payment due in full at registration. Tuition fees are non-refundable. Substitutes welcome at any point, though, and registrations can be transferred to any event within one year. Principals/partners and accountants will be most comfortable. Travel and accommodations and meals are not included. Multiple attendees from the same firm should each complete an individual registration. Pay for two...and the third is free.

ACCOMMODATIONS

We aren't holding a room block, but there are near the venue. The closest is Drury Plaza Nashville Franklin.

REGISTRATION

To register, please follow this link:

<http://2018-benchmarking.eventbrite.com>



help us put the right group together.

Is this a fit for me? That's the question I'd ask in your shoes, so let me take a stab at giving you a candid answer.

Most everyone here will be a partner/principal or the firm's accountant. Either way, you'll get the most benefit if two things are true.

First, you have access to the firm's financial data.

Second, you are in a position to impact the firm's performance, either directly (by making changes) or indirectly (by making recommendations to someone who can).

There will be no forced disclosure of your firm's financial performance, but it will be useful if you can run the calculations on your own numbers. We'll illustrate how to calculate them and then guide you in doing it for yourself.

If you don't have those numbers with you, you can do them on the sample financial statements that we'll provide and then do it when you get back to the office.

As with all of our seminars, there will be an open environment of helpful

sharing, but that's certainly voluntary on your part.

We've priced this one-day seminar so that a principal and the accountant can come together (it's the least expensive event we do). Depending on where you live, you could easily fly in

the night before and leave the same day of the seminar, minimizing your time away from the office.



behind the scenes

DAVID C. BAKER

Understanding marketing is a pursuit of endless depth because it involves an attempt to understand elusive Humans.

Flying airplanes and helicopters gives me context and perspective.

Capturing images tops off my artistic soul and expresses it more kindly.

Music theory and vocal performance majors merge math and linguistics.

Growing up with a

Mayan tribe incorporates anthropology and history.

Learning eleven languages and theology leaves me loving language.

Visiting thirty plus countries helps me define

“best” in different ways.

Consulting is something I understand as meaningful conversations, appropriate venues for applying intellect, and the helpful pressure to articulate.

I see myself as part researcher, part scientist, and part educator. In that role, I have worked with 900+ firms around the world, just like yours.

This seminar is planned, delivered, and owned by ReCourses, Inc., the vehicle through which David C. Baker provides business insight to expert marketing firms as an author, speaker, and advisor.

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