How to Grow Your Professional Services Firm

MADISON | We market professional services firms.

Clients don’t buy professional services the way they buy other products or services. It takes a different playbook.

The funnel doesn't work.

Aggressively generating cold leads, turning them into proposals and closing new work doesn't work with professional services. You've probably already tried.

In order to buy from you, **they have to know and trust you** (or come from a referral).

It's about showing up to serve prospective customers over time.



“

The trick of earning trust is that there are no tricks.”

DAVID MAISTER

The Madison Model:

The best way to market a professional services firm is to become perceived as a **Trusted Advisor** in the minds of your prospective clients. And we believe this is the best way to do that:

Point of View

Get clear on what you do, who you do it for, and why you're different.

Authority Marketing

Show up consistently and generously with your best thinking.

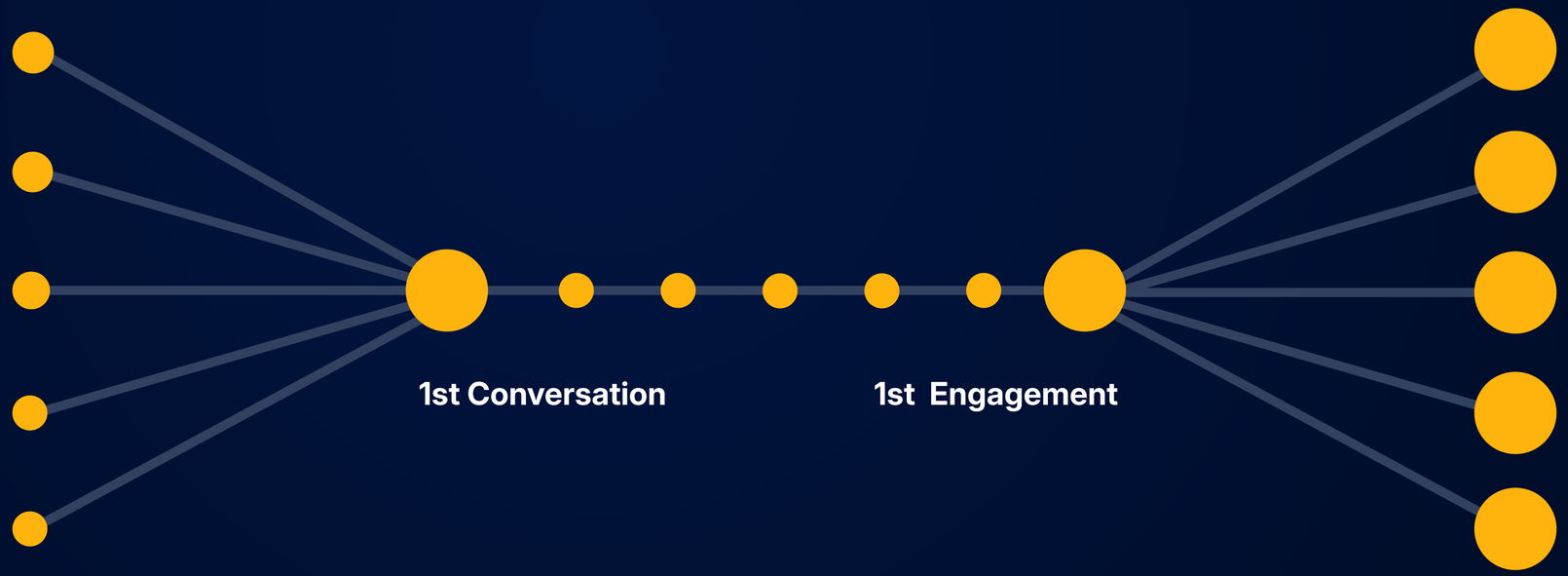
Authentic Business Development

Create respectful ways for them to raise hands when they're ready. Don't "sell". Love and serve people.

Delivery Excellence

Earn the right to more work. Create raving fans.





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You probably sell similar services to your competition. The way you stand out is through a clear and differentiated Point of View.

These are not differentiators.

- ❌ "We're a full-service firm"
- ❌ "We combine best-in-class capabilities with excellent client service"
- ❌ "We have a wide range of industry experience"
- ❌ "We measure our success in the results we get for clients"
- ❌ "We partner closely with our clients"
- ❌ "We're a team of innovative, multi-disciplinary thinkers"

Not people. Not skills. Solutions.

Many firms sell groups of skills or team members. Their offering is effectively "we have people that do stuff."

Turn these into **solutions** - clear engagement types that are easy to understand, focused on a client outcome.

Collectively these solutions become your **menu of offerings**. Each mapped to one or more stages of the client journey, with various levels of commitment.

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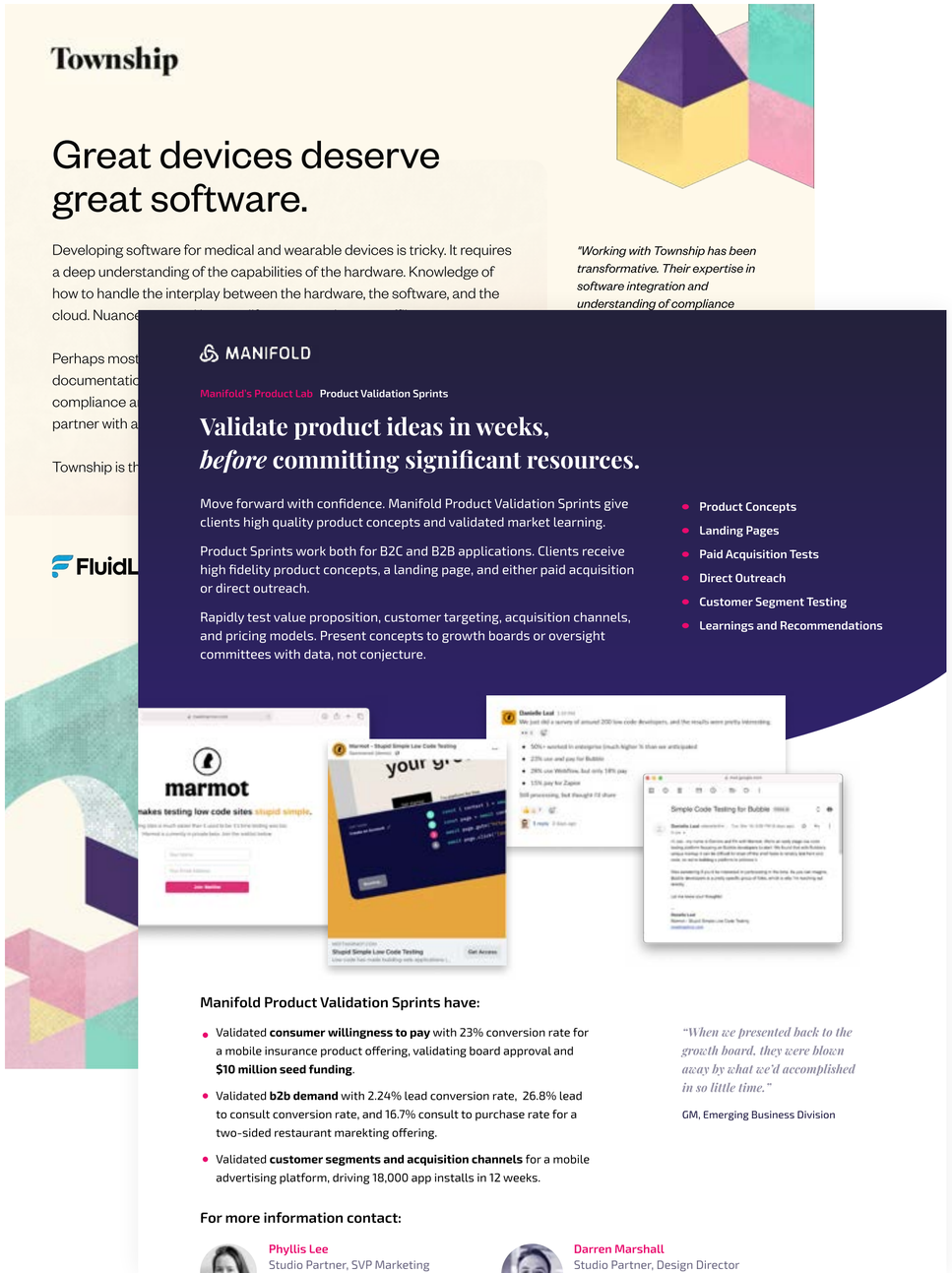

Your Values.

Values differentiate your company in the minds of your team and your client. They help filter candidates. They help facilitate strategic decision making.

Calling: Professional services is a noble profession. We are called to help great advisors get the attention they deserve.

Wisdom: The world doesn't need information. It needs wisdom. Hard earned, thoughtful lessons practically applied. Our client's ideas are valuable and deserve a wider audience.

Craft: Work is an opportunity to bring the best of yourself to the world. It's a laboratory for the development of character. Knowledge work is as much a craft as woodworking, as much an art as molding clay.

Details: Work is a performance. We believe not just in delivering great work but creating memorable experiences, for our clients and our team.

Stewardship: Our clients are trusting us with their businesses, and we take that responsibility seriously. We treat their company, their resources, and their reputations as if they were our own.

Perspective: We believe in having a longer time horizon. In compound interest. We believe trust is built over time, by making promises and keeping them, over and over again.

Humanity: We believe people will increasingly want real stories from real people who work at real companies. That in a world where you can't tell what's real and what's not, people will want to interact with people more, not less.

Your Ideal Client Profile

A clearly defined ICP improves everything you do. It clarifies messaging, informs offerings, and helps design a better business development process.

FIRMOGRAPHICS

- Industries you target
- Revenues
- Headcount
- Geographic constraints

OPERATIONAL FACTORS

- Purchasing behavior
- Sales cycle
- Decision makers

SITUATIONAL FACTORS

- Strategic hires
- Strategic initiatives
- Mission/value alignment

FOR KEY DECISION MAKERS

- Goals and objectives
- Pain Points
- Influencers
- Communication Preferences
- Associations

Scripting Your Unified Theory.

- **Outcome:** What do your clients really want? Not your service, but what your service gives them.
- **Problem:** Why can't your ideal clients achieve that outcome on their own? What's truly getting in the way? (both external and internal/ behavioral.)
- **Diagnosis:** What do you believe about why these obstacles exist and how best to address them?
- **Solution:** Why is your solution(s) the answer to solving the problem, based on your perspective?

"Many professional services firms struggle to grow. We believe this is because you can't market them the way you market other things. We believe you do it by becoming a Trusted Advisor in the minds of your prospective clients. And we believe the best way to do that is by getting laser focused on what you and for whom, showing up clearly and consistently with your best thinking, and creating respectful ways for people to raise hands when they're ready."

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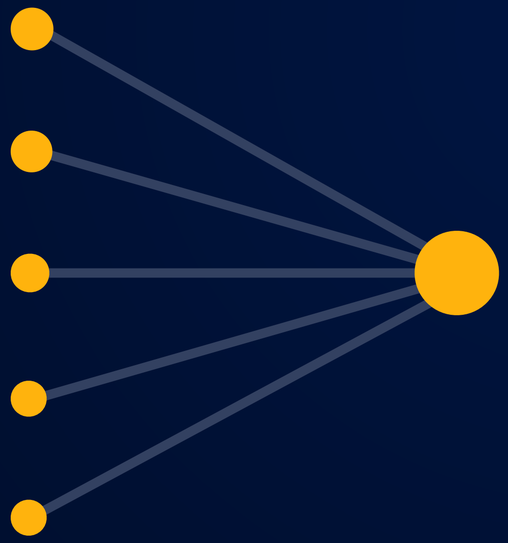


5%

Of your audience is “in-market” at any given time (per LinkedIn).

81%

of in-market buyers go with the brand that comes to mind first (per Bain.)

87% of decision makers said **thought leadership** increases trust.

89% of decision makers said thought leadership enhances their perception of the firm's brand.

58% of decision makers said they choose to do business with a firm based on thought leadership.

61% Are willing to pay more to work with a firm that articulates a clear vision via thought leadership.

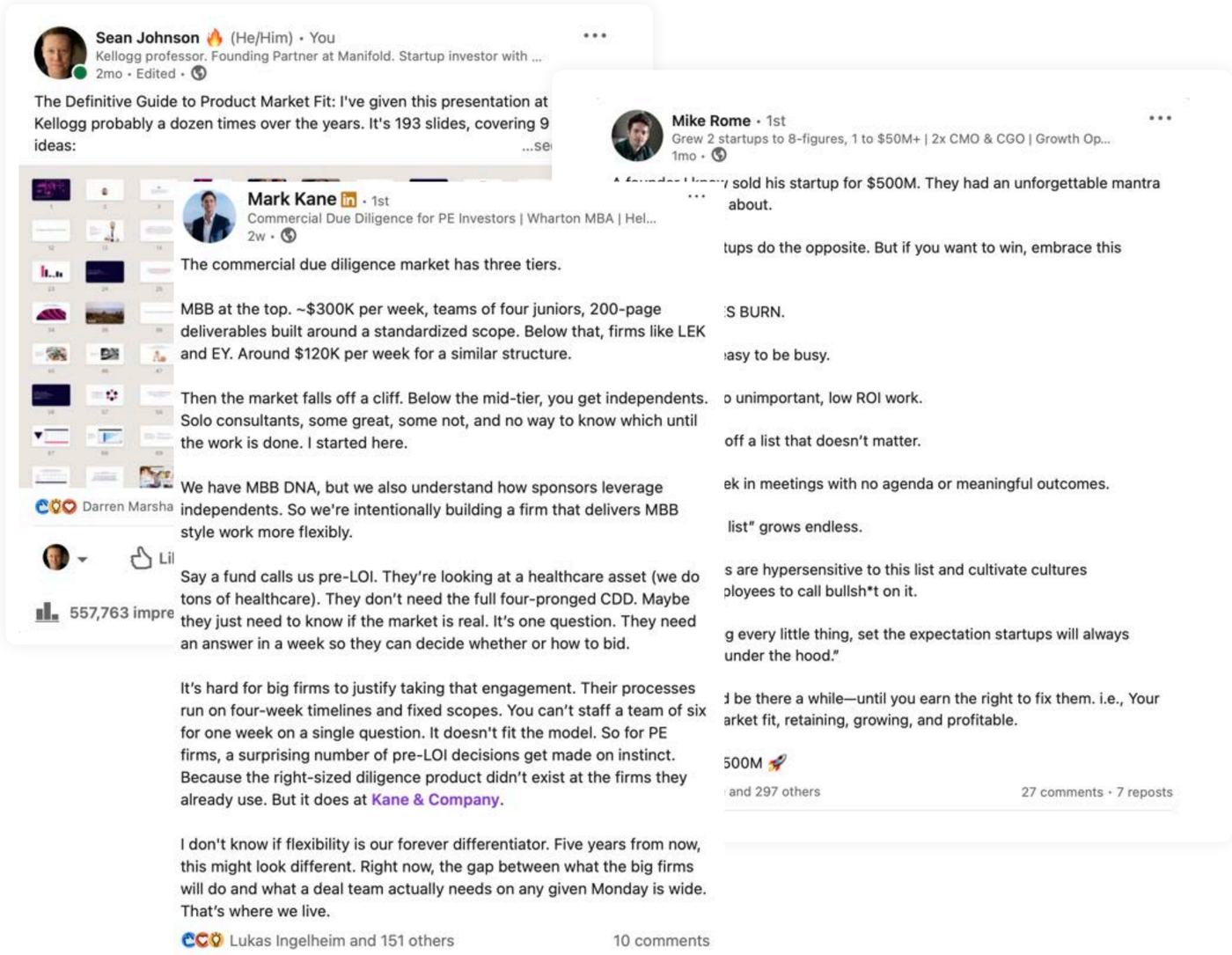
People buy from people, not companies.

So the majority of your marketing should come from your people. We believe:

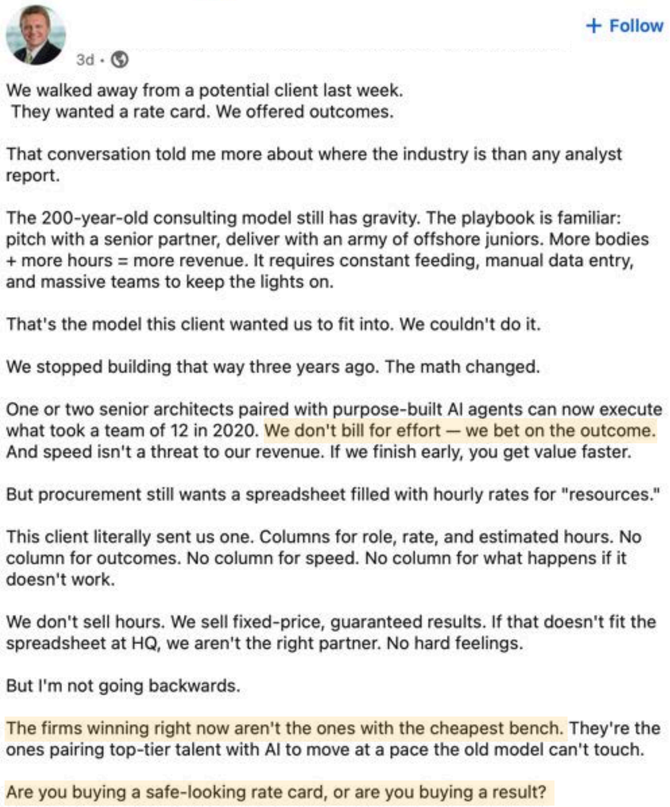
- **Every revenue-generating professional** should have a communication cadence...
- About their respective area of expertise...
- Infused with their personality and the point of view of the company...
- Published consistently...
- Tailored using the best practices of the channel used to communicate the message.

Give Away Your Secrets.

Become gratuitously helpful. Give away your best insights, your best ideas. The best content for becoming a Trusted Advisor helps clients think through how to do the thing that you'd be hired to do for them. Understanding the process. Navigating the pitfalls. Providing counterpoints to common knowledge. Sharing stories from past wins and losses.



A note about the robots.



3d •

+ Follow

We walked away from a potential client last week.
They wanted a rate card. We offered outcomes.

That conversation told me more about where the industry is than any analyst report.

The 200-year-old consulting model still has gravity. The playbook is familiar: pitch with a senior partner, deliver with an army of offshore juniors. More bodies + more hours = more revenue. It requires constant feeding, manual data entry, and massive teams to keep the lights on.

That's the model this client wanted us to fit into. We couldn't do it.

We stopped building that way three years ago. The math changed.

One or two senior architects paired with purpose-built AI agents can now execute what took a team of 12 in 2020. We don't bill for effort — we bet on the outcome. And speed isn't a threat to our revenue. If we finish early, you get value faster.

But procurement still wants a spreadsheet filled with hourly rates for "resources."

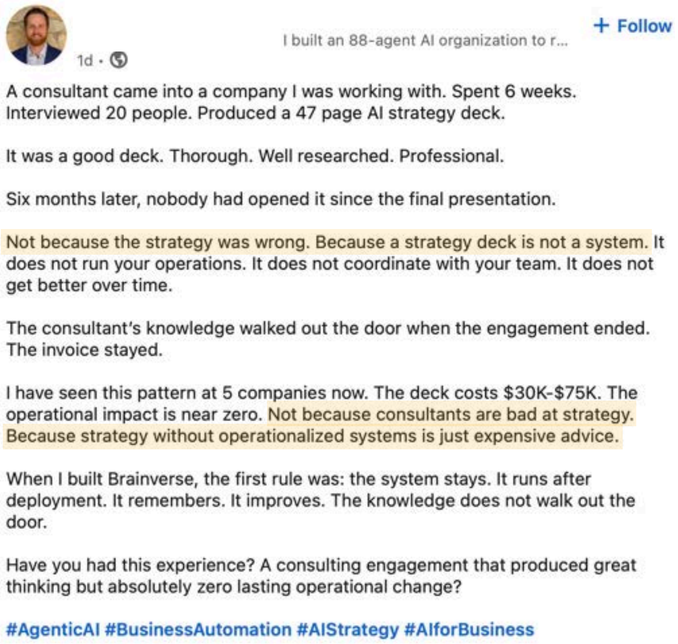
This client literally sent us one. Columns for role, rate, and estimated hours. No column for outcomes. No column for speed. No column for what happens if it doesn't work.

We don't sell hours. We sell fixed-price, guaranteed results. If that doesn't fit the spreadsheet at HQ, we aren't the right partner. No hard feelings.

But I'm not going backwards.

The firms winning right now aren't the ones with the cheapest bench. They're the ones pairing top-tier talent with AI to move at a pace the old model can't touch.

Are you buying a safe-looking rate card, or are you buying a result?



1d •

I built an 88-agent AI organization to r...

+ Follow

A consultant came into a company I was working with. Spent 6 weeks. Interviewed 20 people. Produced a 47 page AI strategy deck.

It was a good deck. Thorough. Well researched. Professional.

Six months later, nobody had opened it since the final presentation.

Not because the strategy was wrong. Because a strategy deck is not a system. It does not run your operations. It does not coordinate with your team. It does not get better over time.

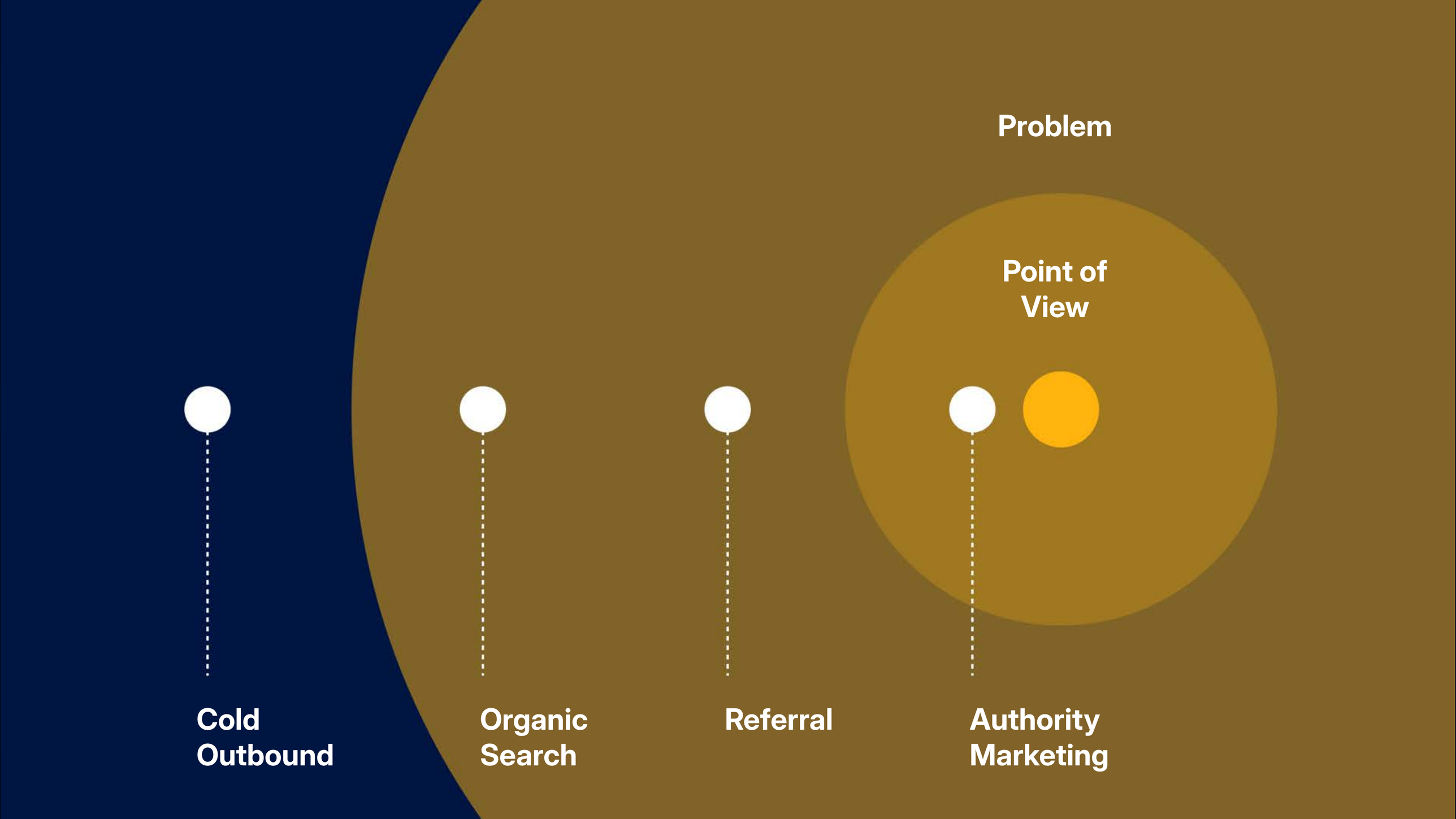
The consultant's knowledge walked out the door when the engagement ended. The invoice stayed.

I have seen this pattern at 5 companies now. The deck costs $30K-$75K. The operational impact is near zero. Not because consultants are bad at strategy. Because strategy without operationalized systems is just expensive advice.

When I built Brainverse, the first rule was: the system stays. It runs after deployment. It remembers. It improves. The knowledge does not walk out the door.

Have you had this experience? A consulting engagement that produced great thinking but absolutely zero lasting operational change?

#AgenticAI #BusinessAutomation #AIStrategy #AIforBusiness


Problem
Point of View
Cold Outbound
Organic Search
Referral
Authority Marketing

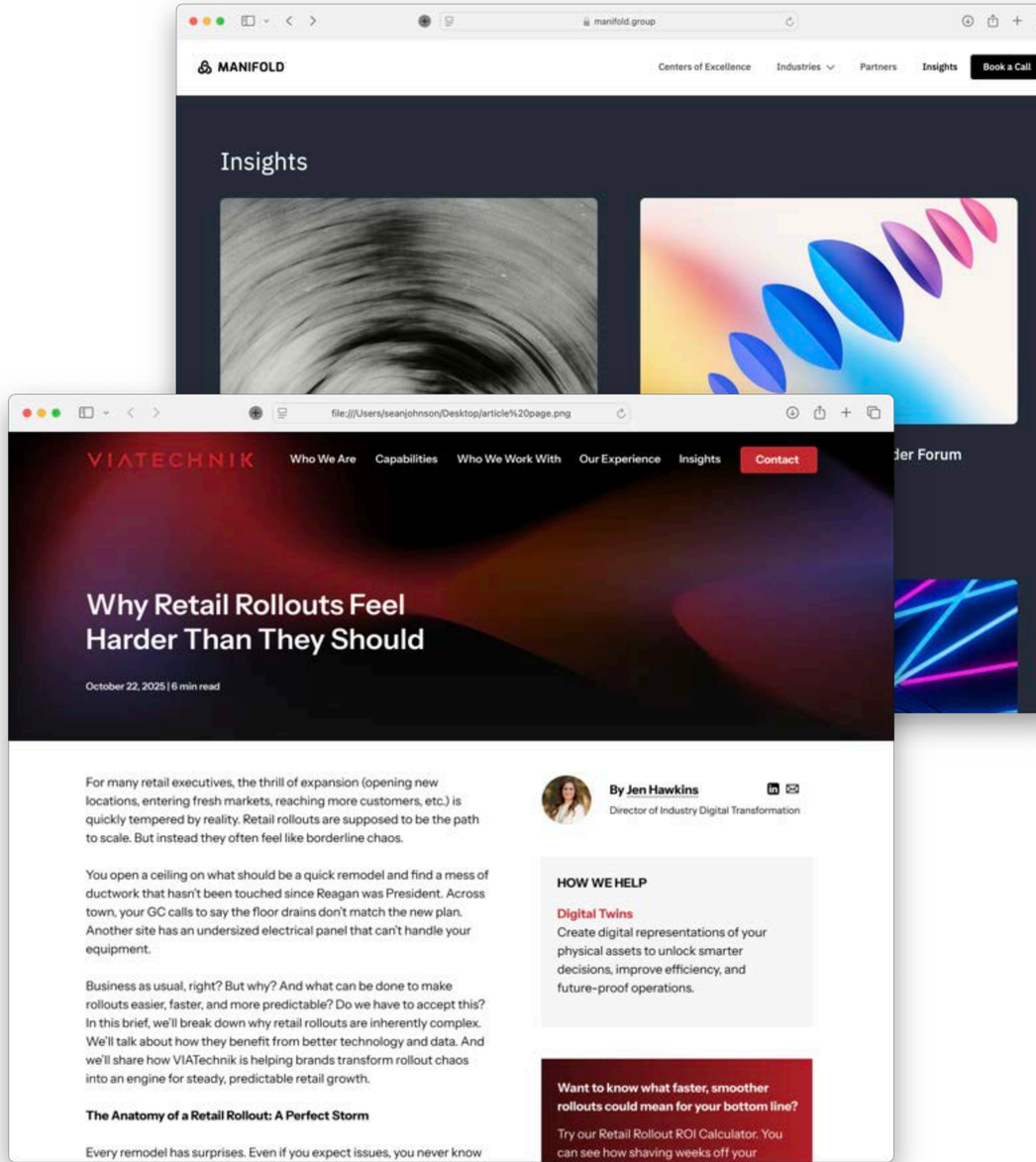
The role of long-form content.

You want to build a library of evergreen content. Articles are written by the revenue generating professionals or SMEs, with clear CTAs to reach out to them for more info.

With callouts clearly stating how you can help clients take advantage of the insights in each article.

Not organized chronologically, but taking the client on a journey from awareness, through consideration, and ultimately toward taking action.

Each should have a content upgrade specifically about that article to start building relationships. Those content upgrades should trigger a series of emails nurturing them further down the funnel, and gets piped to your CRM.



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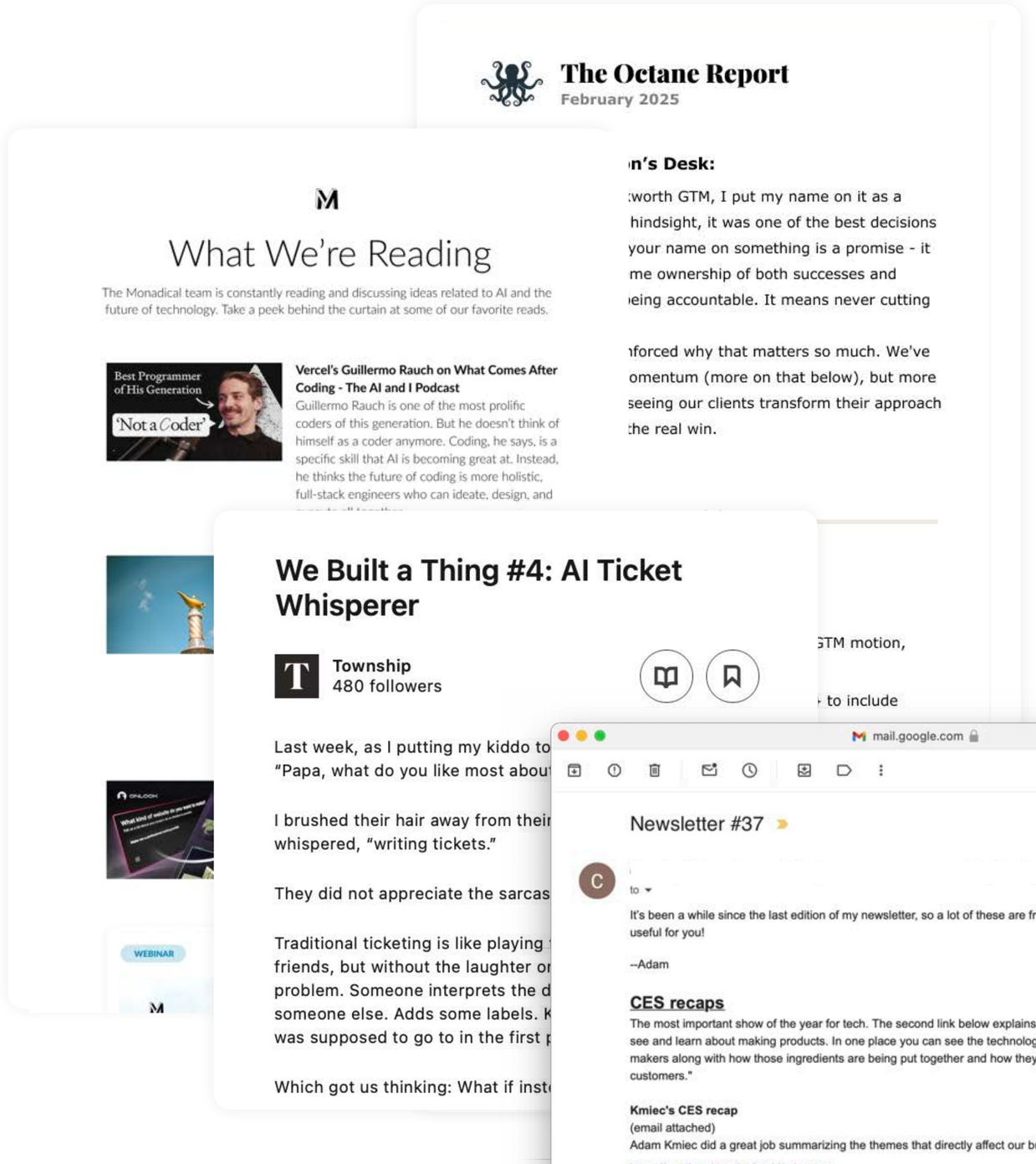
Value-added newsletters.

The best newsletters aren't just sharing your wins and accomplishments. Always add value.

You can even have them be from individuals rather than the firm. Informal. Plain text. Sharing links, ideas, resources. Provides an easy way to appear in inboxes each month.

Newsletters hosted on LinkedIn have frictionless signup. Subscribers receive notifications and an email.



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Produce high-impact webinars that directly map to your ICP's pain points.

Webinars provide gentle and respectful ways to deepen relationships and move potential clients down the funnel.



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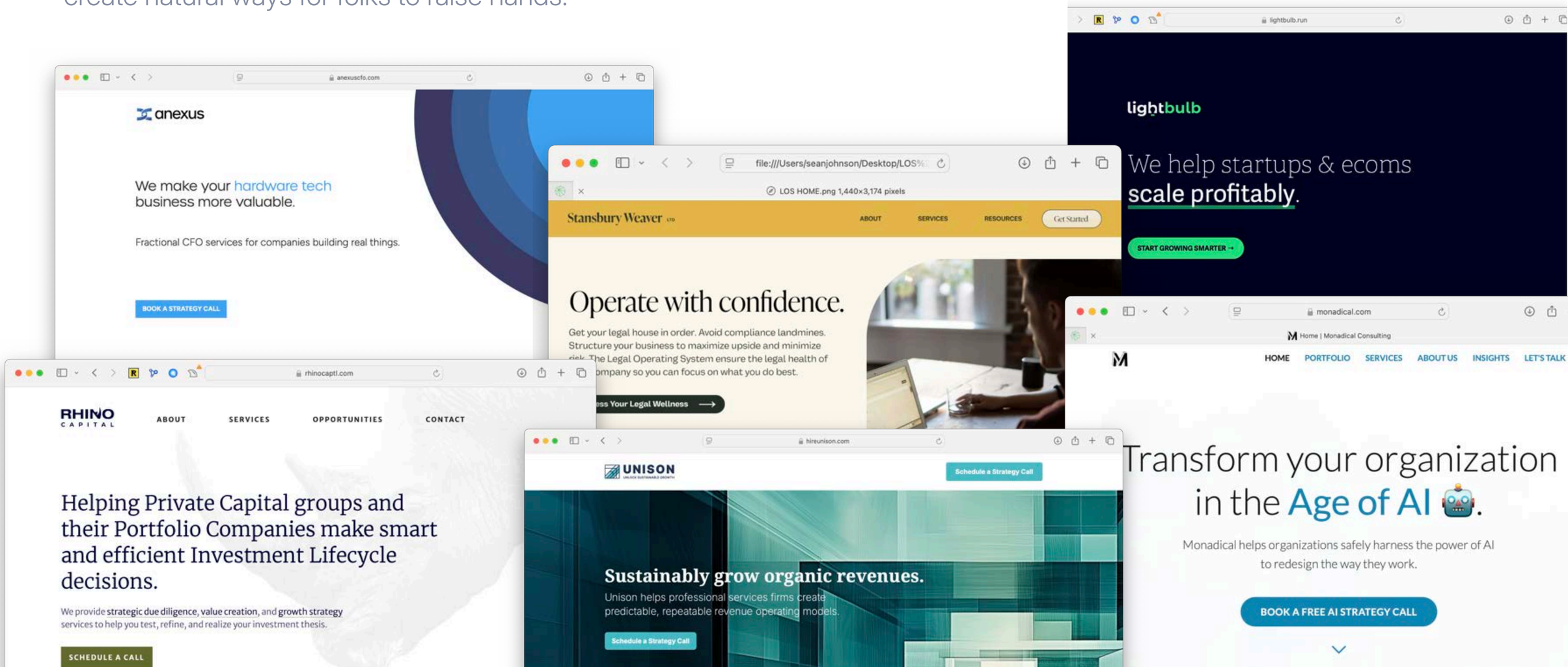
Your website is a conversion tool, not an awareness tool.

For most firms, the people visiting your site are the people who are already aware of you. Optimize it to reinforce the trust built by your Authority Marketing, and create natural ways for folks to raise hands.



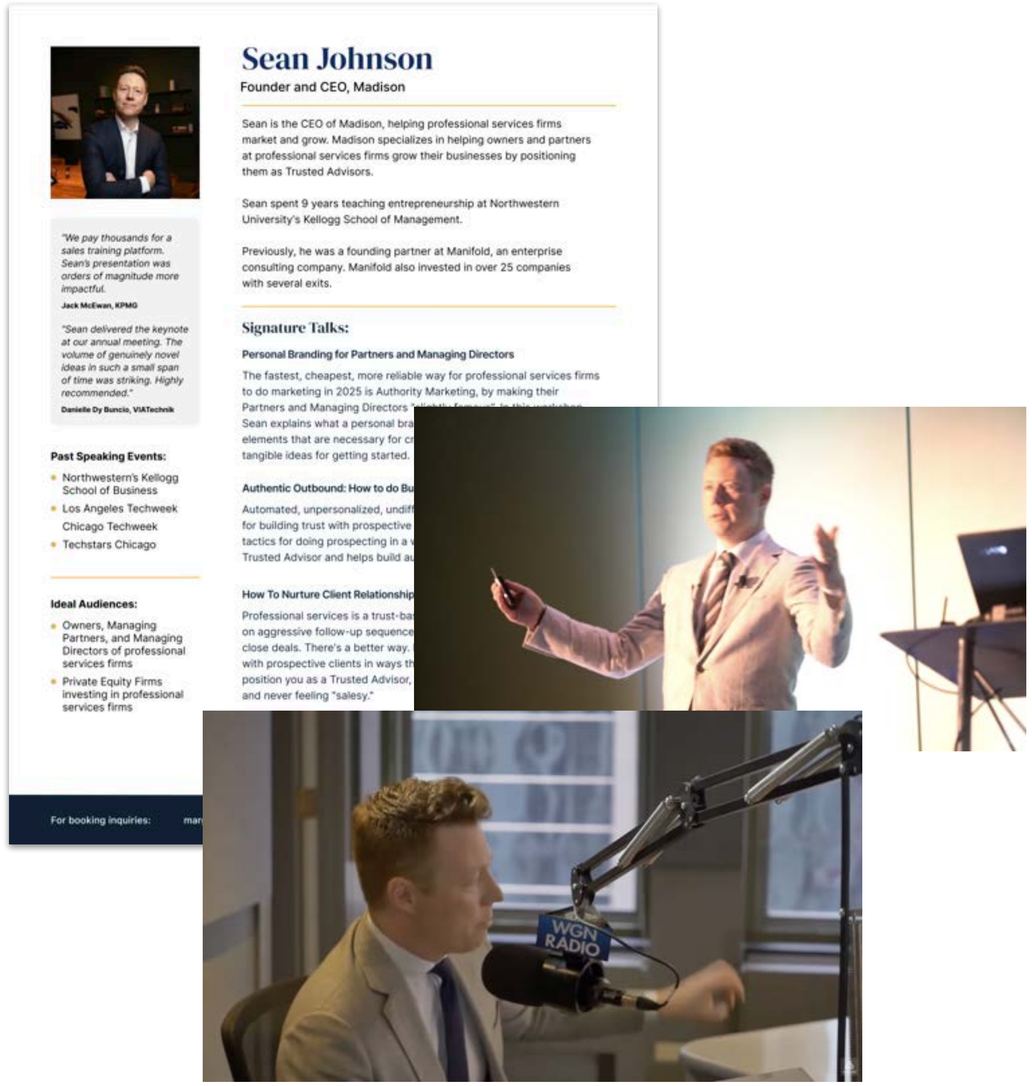
Go outside.

Maintain a list of every conference in your space. Have a well-crafted speaker kit with credentials for each SME, their list of topics, and previous appearances.

Submit speaker proposals for every conference. When you speak, you make sure you get it recorded, and turn the recording into a lead magnet on your website.

Provide a soft CTA for something of value to get people to proactively reach out post-conference.

Have a strategy for conferences you're attending but not speaking at to maximize their value.



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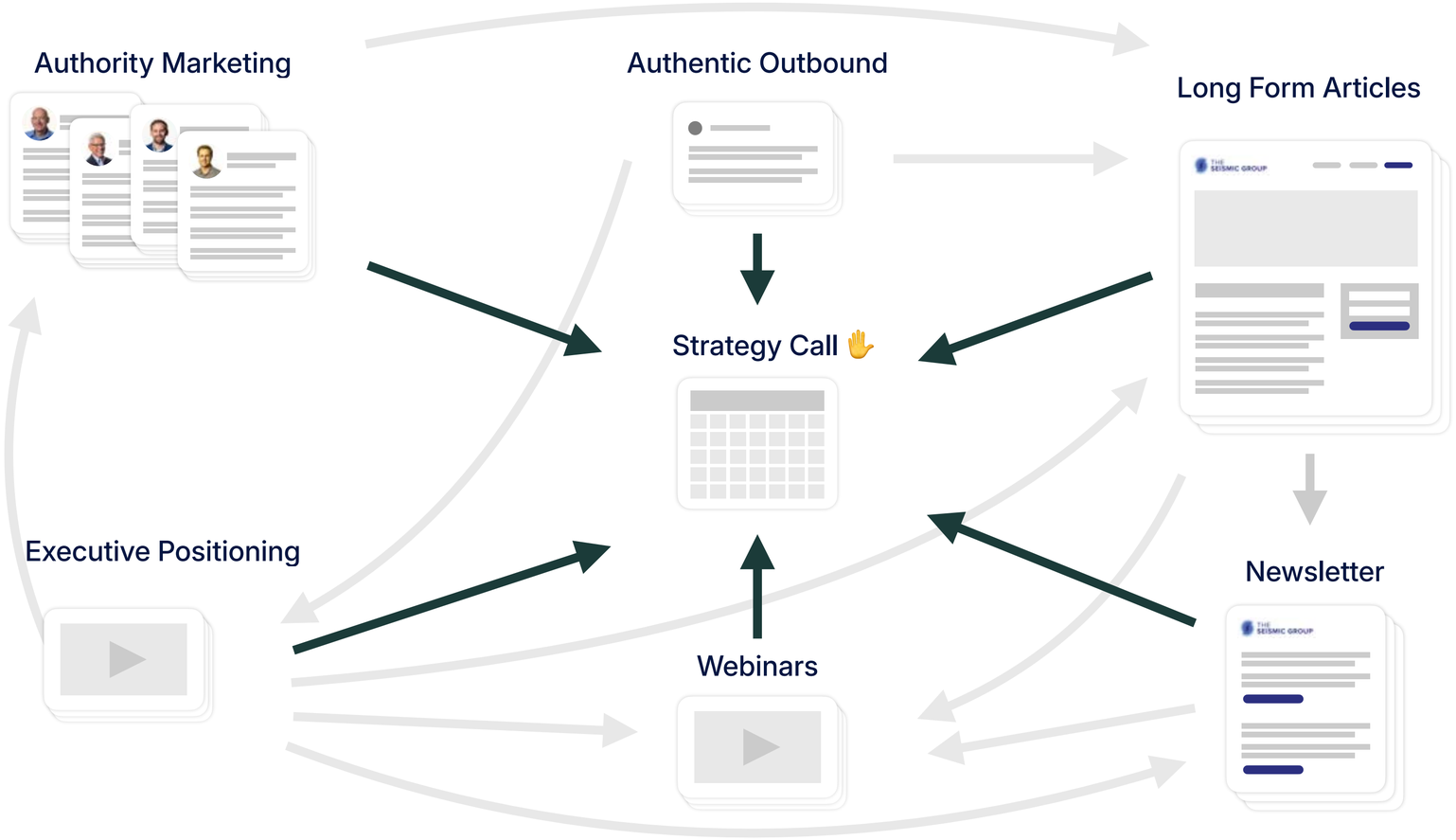
Everything works toward raising hands.

Everything descends from having something thoughtful and intelligent to say.

Each channel reinforces the others, and content can be repackaged and repurposed in other ways.

Everything ultimately is trying to drive to the same place, which is someone raising their hand.



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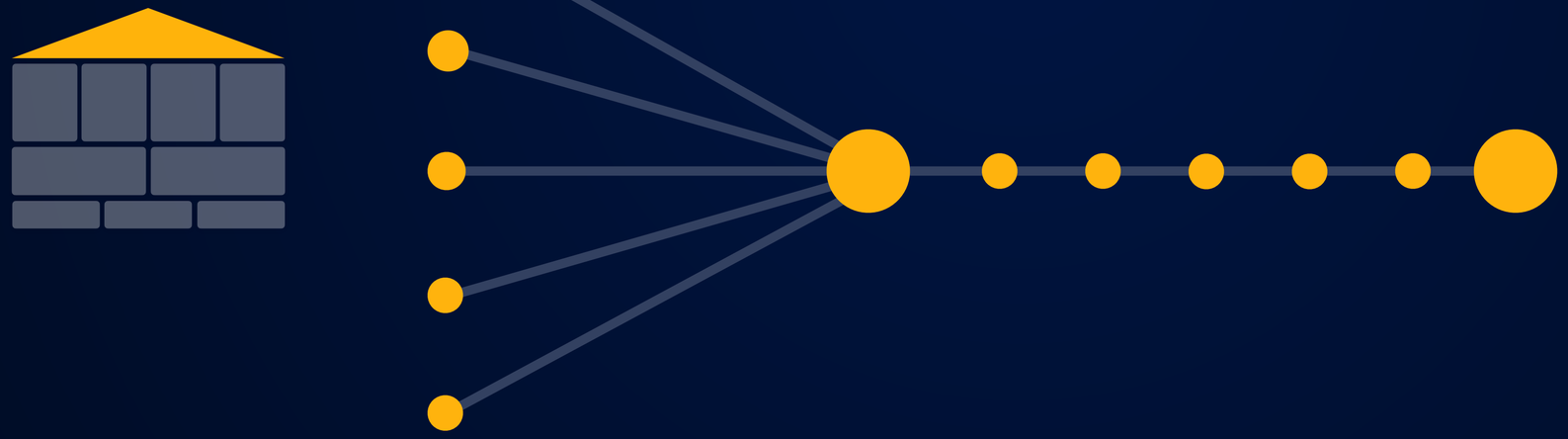

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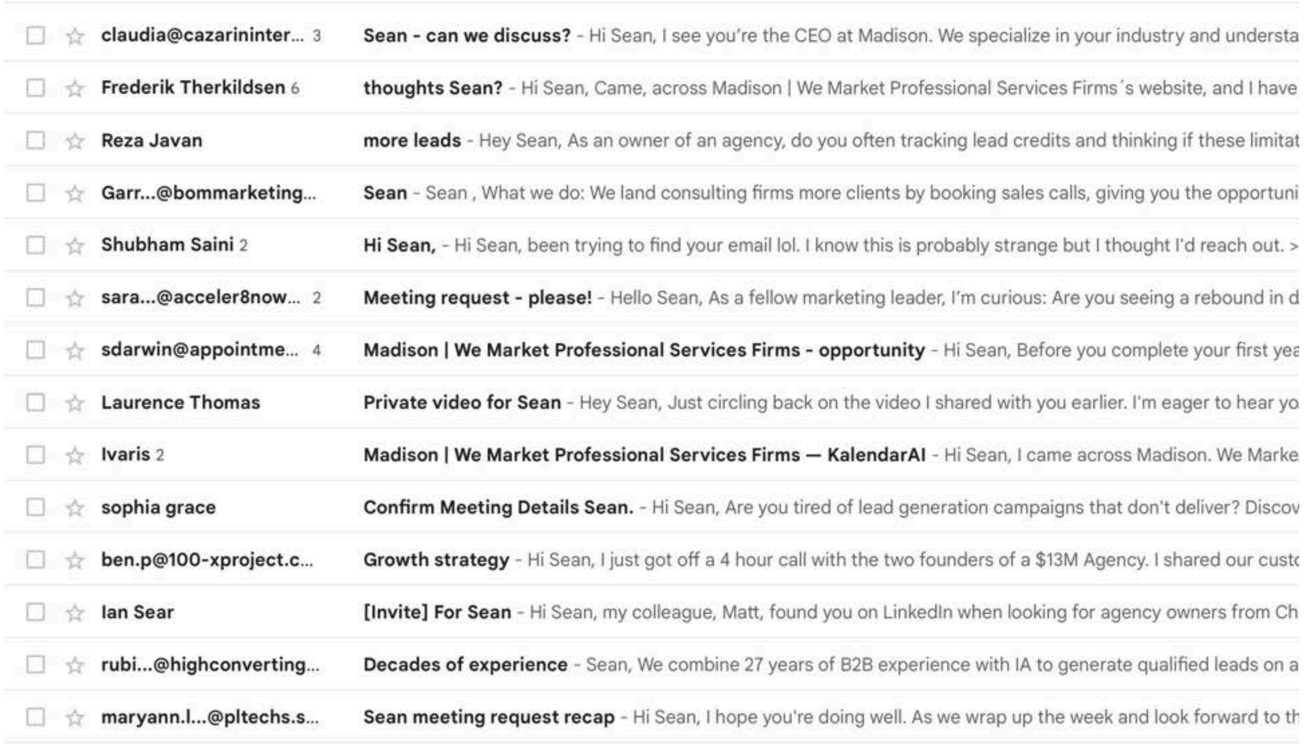
“Would you like 15 leads on autopilot every single month?”

You likely hate the word "sales". You may have revenue targets. But you don't think of yourself as a salesperson.

You love the work. You love serving clients. You love solving hard problems.

Ideally, your business development process align with that worldview (and the worldview of your clients, who want a trusted advisor).

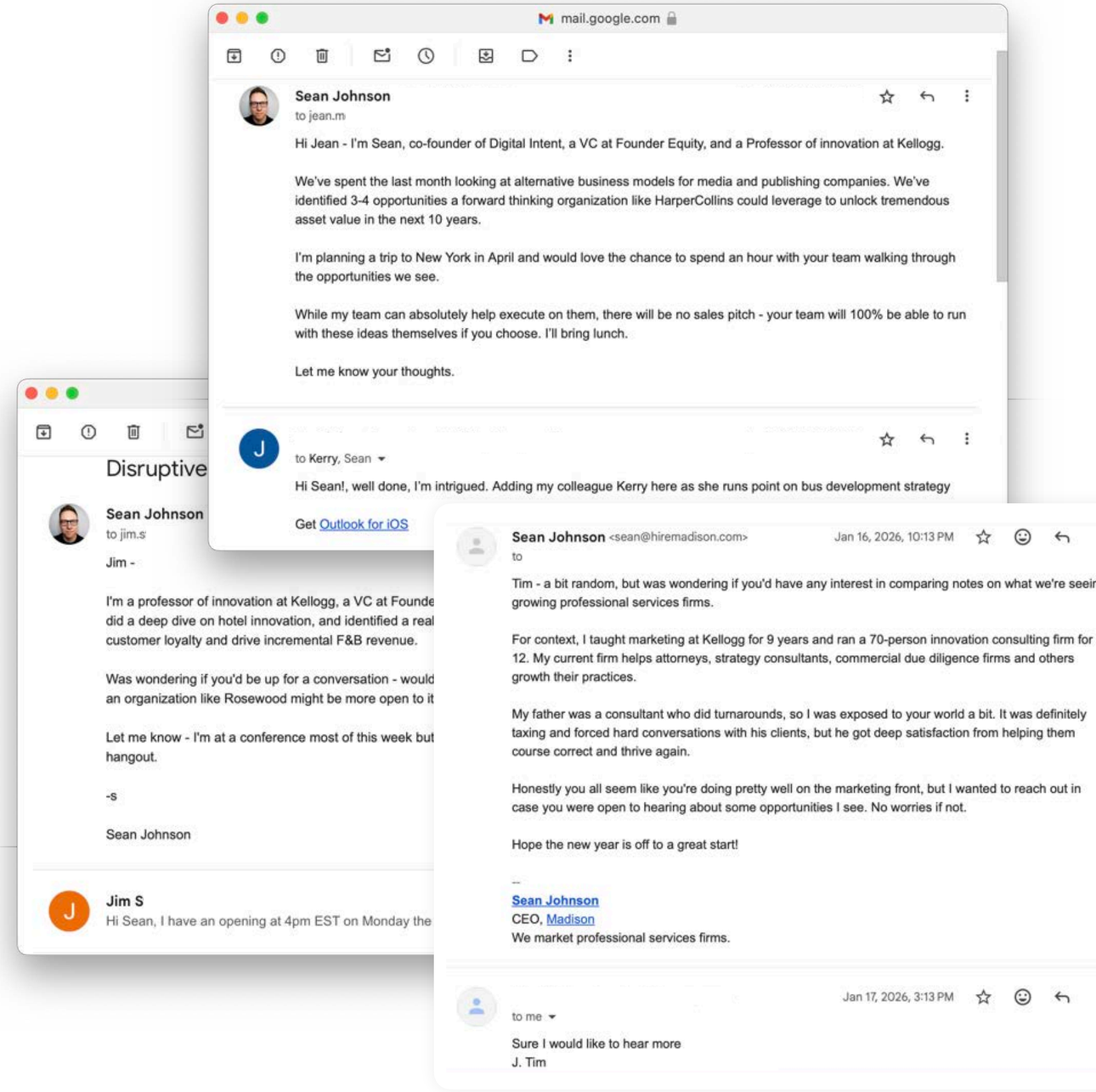


Don’t do “business development.”
Love and serve people.

When prospecting, do things that don't scale.

We believe there is a place for prospecting. But it should always be highly personalized, relevant, and winsome.

5 highly personalized, highly relevant touches will beat 100 pieces of mad-lib spam.



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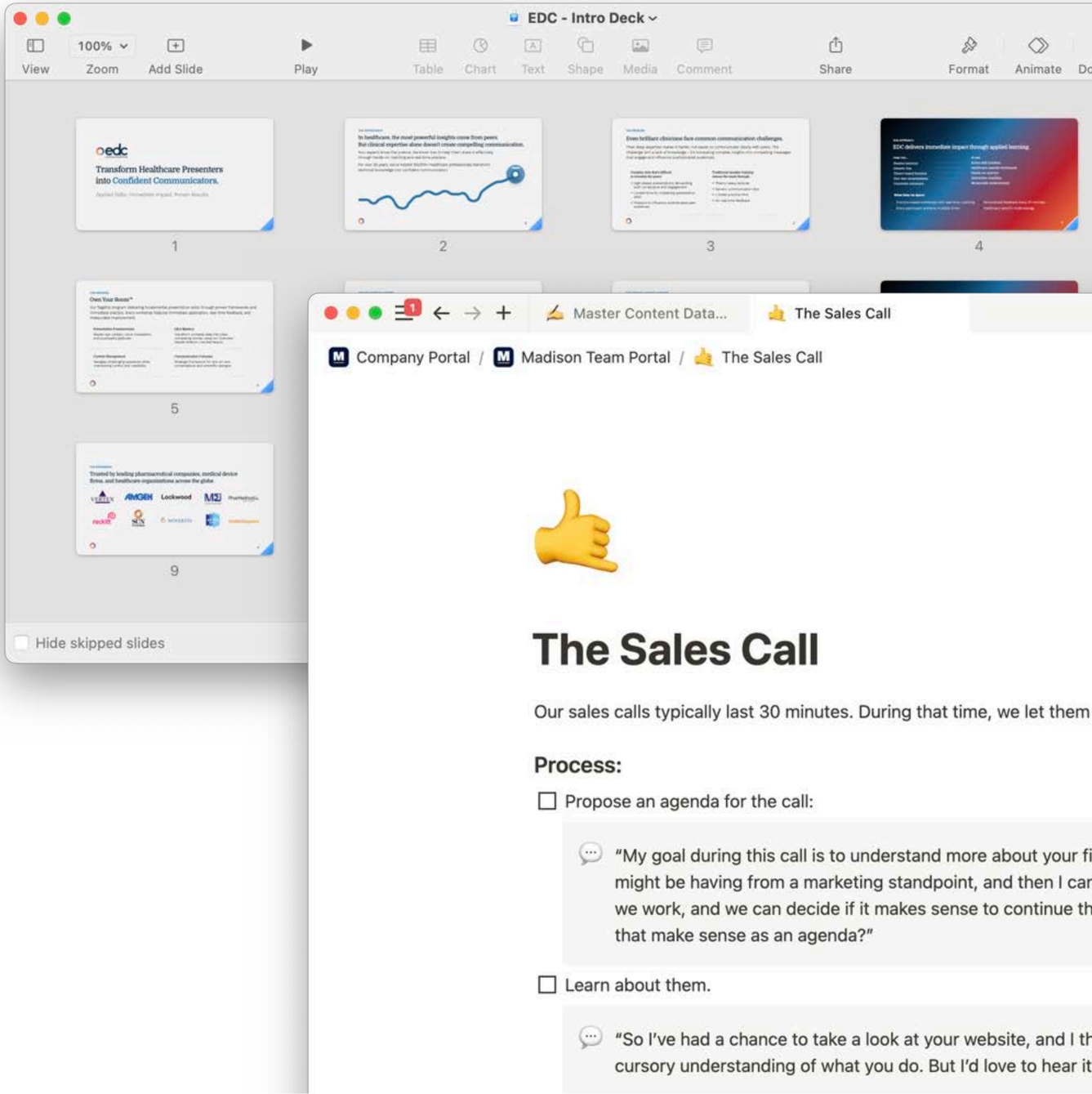
Have a tightly scripted initial call.

80% of the call should be about them.
Ask questions that demonstrate expertise.
When it's your turn, a short 8-12 slide deck.
Problem > Point of View > Solution.
Have a clear next step.



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“Just checking in” doesn’t work.

Make Authority Marketing Your Foundation.

By inviting people into your world and sharing your best ideas over time, you build trust passively. They see your face and your headline and start to think of you as someone who can help them with their problems.



Increase the useful life of your Authority Marketing content.

Your content isn't just useful for building awareness. It's at least as useful for nurturing relationships, responding to questions, overcoming objections.

But LinkedIn is ephemeral. Your site is a labyrinth. You need to make it easy for your team to find what they need when they need it.

You've identified a clear POV (More about this here)

- [ ] ICP (more about this here)
- [ ] Values (more about this here)
- [ ] Beliefs (more about this here)
- [ ] Tone (more about this here)

You have a high level "unified theory" about what you do.

Learn more about this here.

- [ ] It explains the way you see the world concisely.
- [ ] It creates differentiation. (more about this here)
- [ ] It informs your menu of offerings.
- [ ] Ideally you codify your unified theory (or a subset of it) into a framework that's memorable and creates differentiation. (more about this here)
- [ ] You have a version of the "table of contents" for the book on how to do what it is your organization does. This informs your short and long-form efforts.

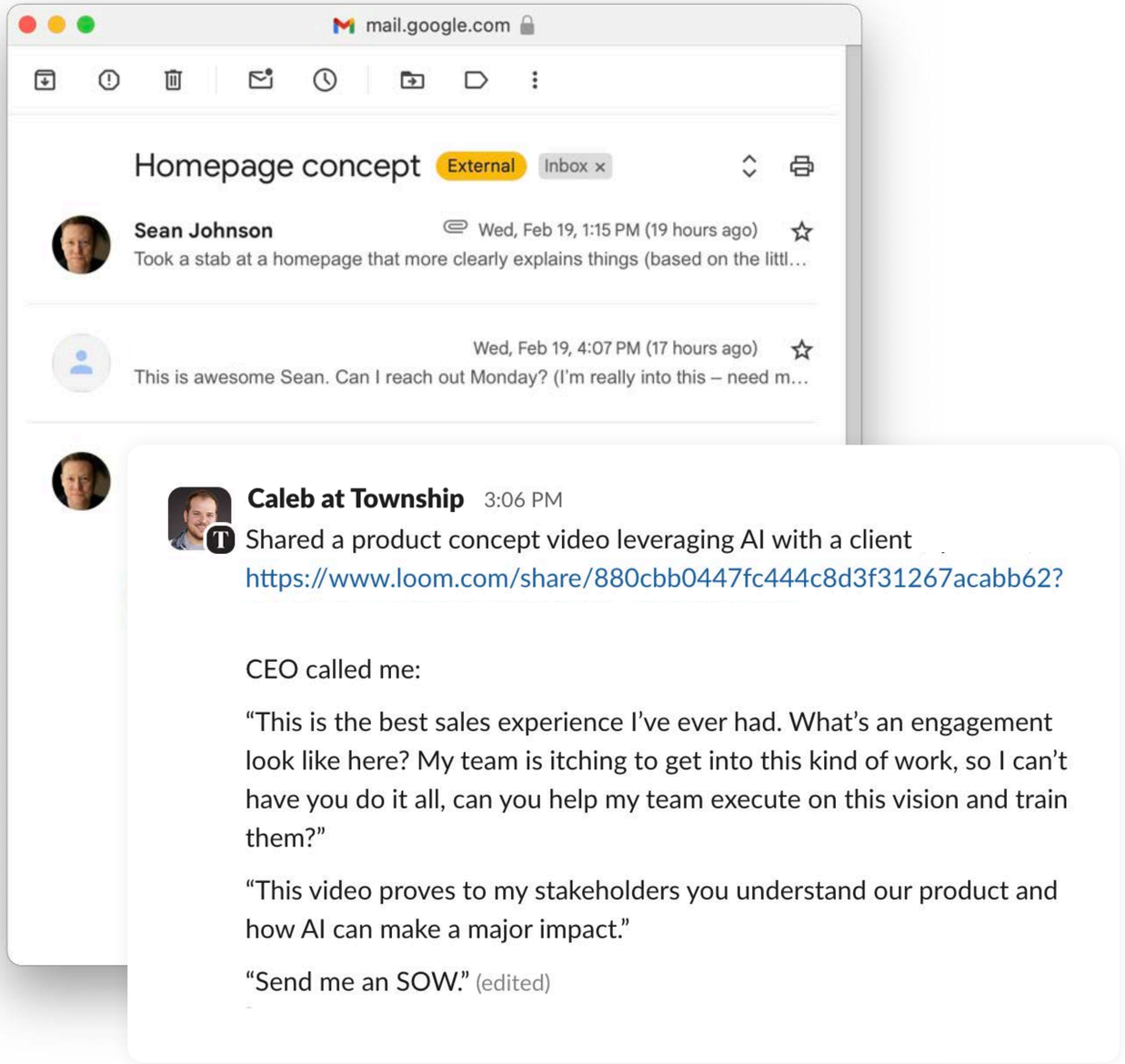
You have a clear menu of offerings

- [ ] You know what you do, why you do it, and how you do it reliably
- [ ] Mapped to the client's journey (more about this here)
- [ ] Each item ideally has some time of onboarding or wedge engagement to get in the door. (more about this here)
- [ ] You know how one item in the menu of offerings leads to another, and you have a perspective on the ideal order of operations for attacking the menu of offerings (which you deviate from based on client need).

“We made a thing just for you.”

If you have deliverables that are relatively easy to create but perceived as high value to the client, give them away.

A prototype is worth 1000 conversations.

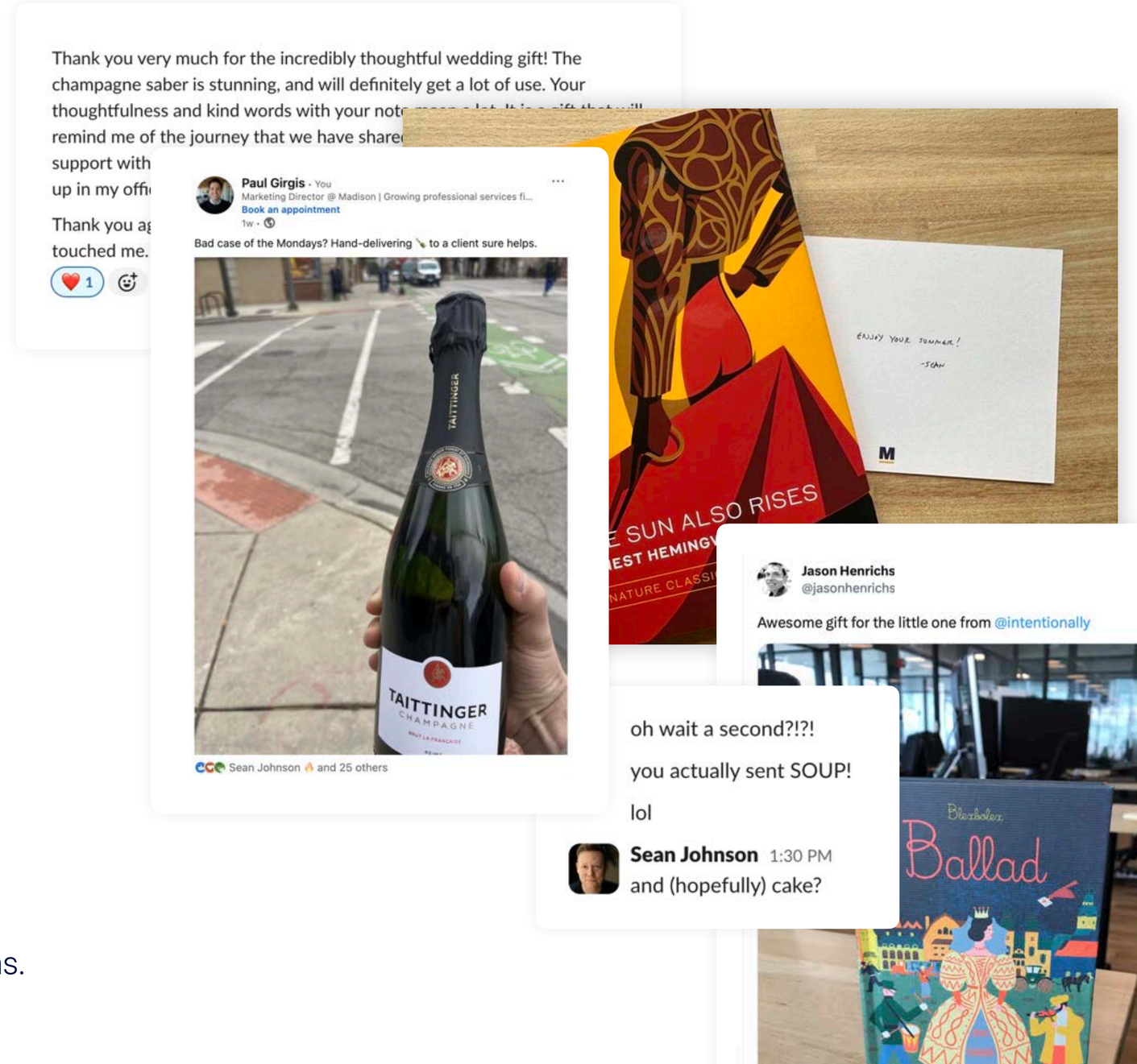


Don’t Send Swag. Do Send Stuff.

People want to rep their company, not yours.

People don’t throw away books. Sign the inside flap, add a small note.

People like 🍾. Celebrate with them.



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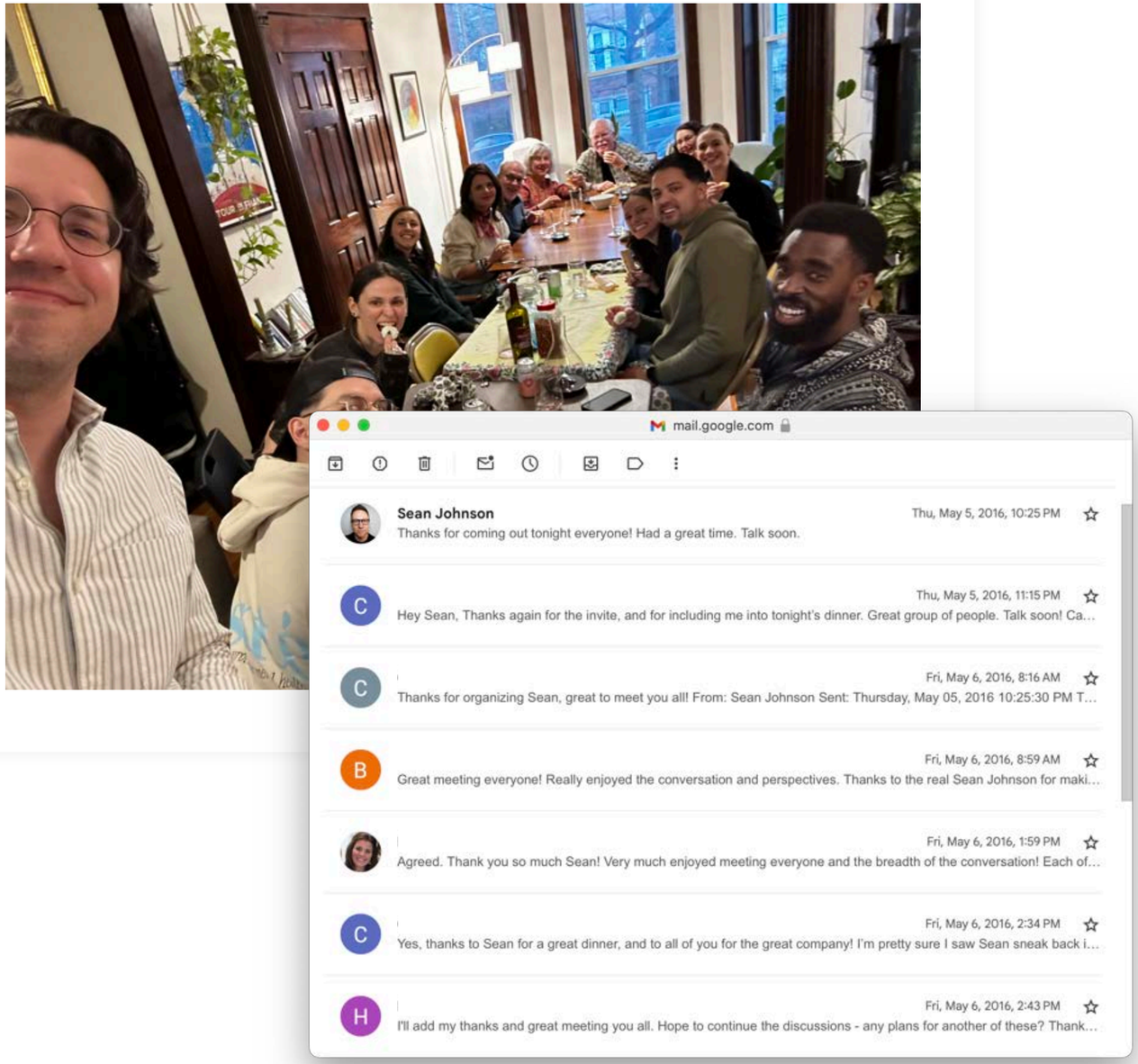
The 3 Hour Dinner

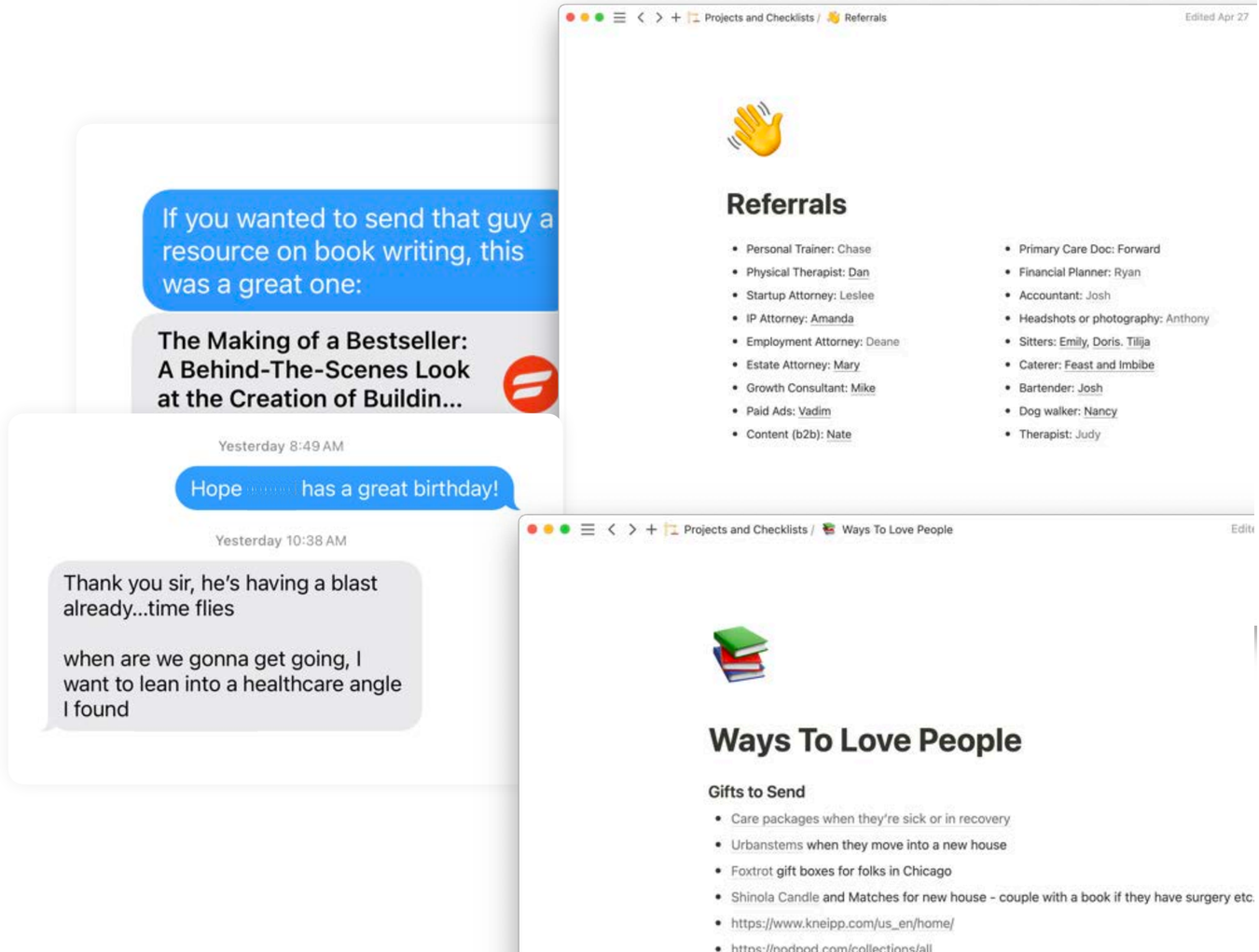
Invite 6-8 people to a dinner. Tell them specifically why you invited them. Get out of the way, let them hit it off. Send a note the next day connecting them all.



Be top of mind when buying windows naturally emerge.

While it can be hard to manufacture buying windows, you can be the first person they think of when those windows emerge.

Design natural and respectful ways to keep in touch. Sharing resources and ideas, making intros, always serving. Managed at scale inside your CRM.



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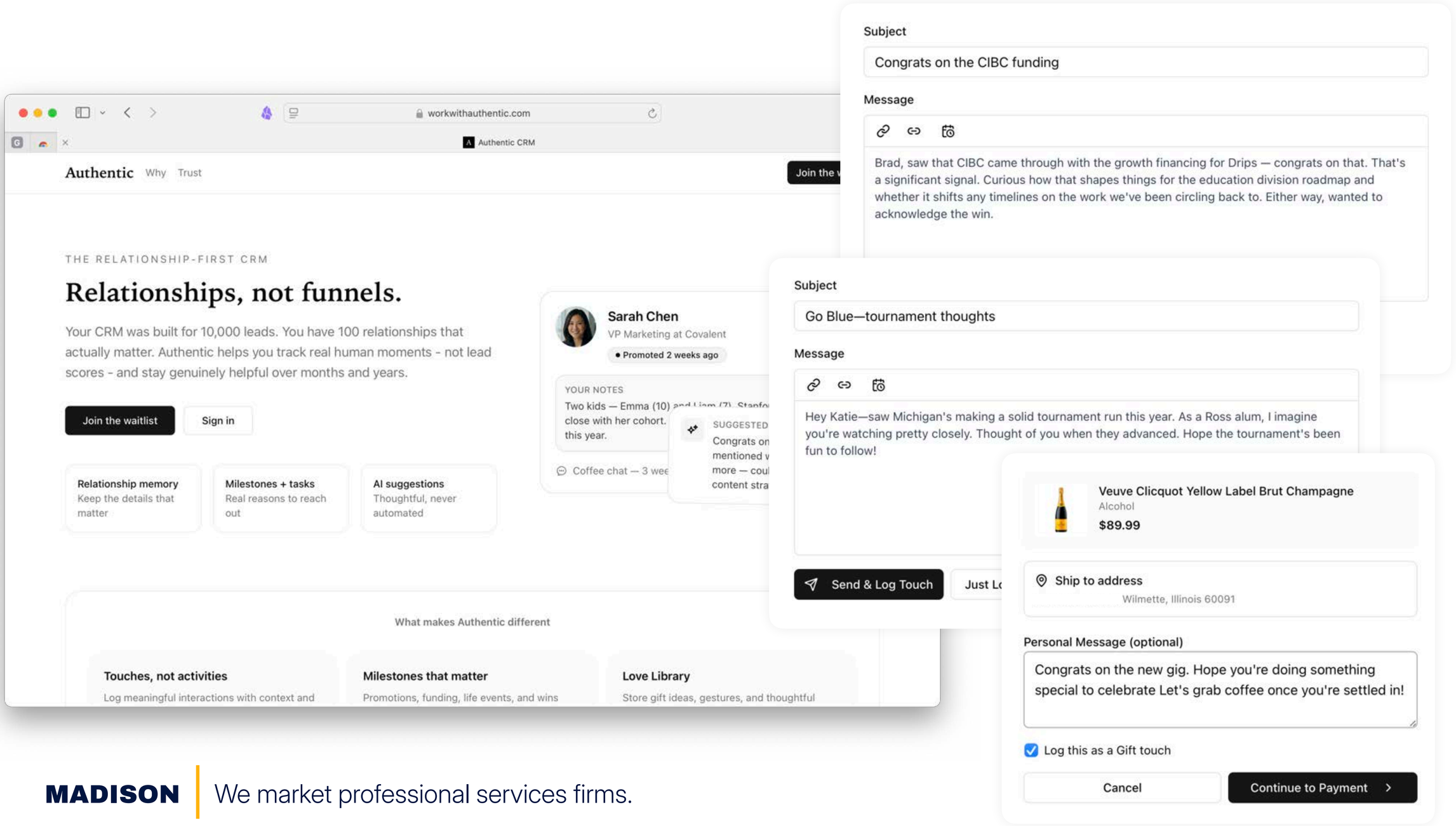

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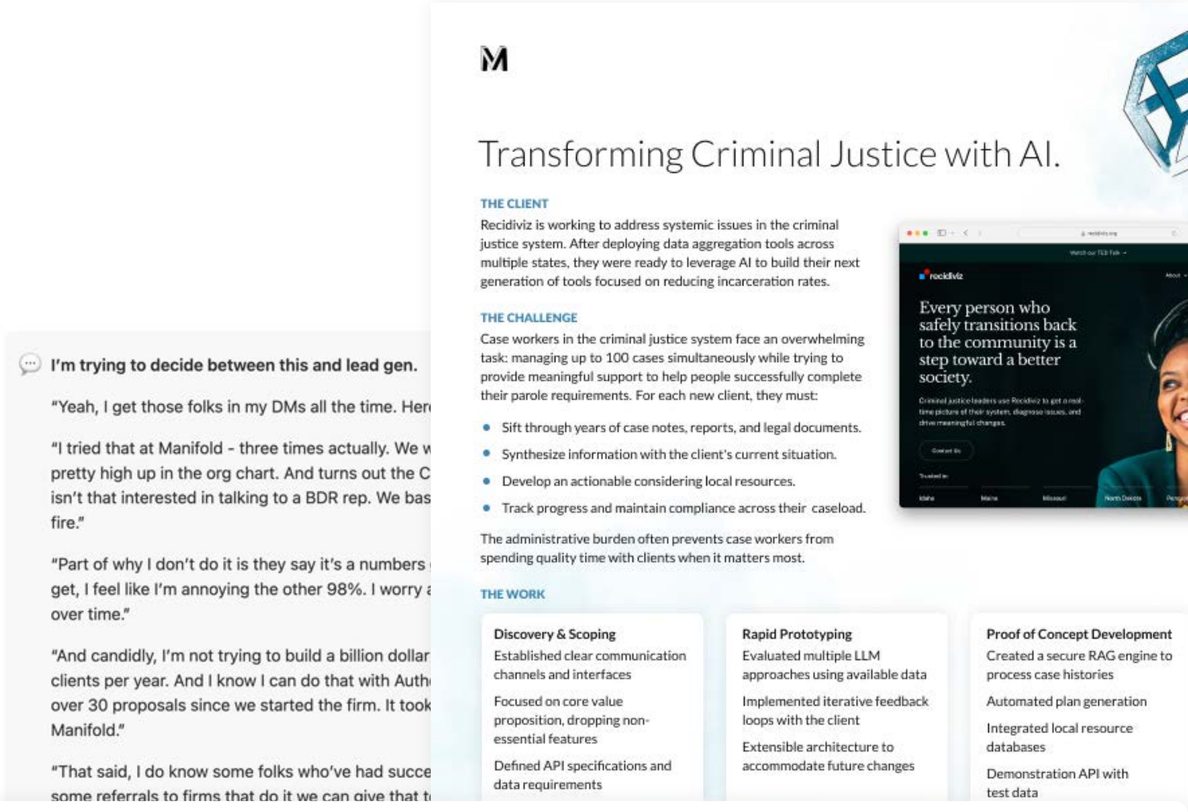
Have a library of sales enablement materials to nurture.

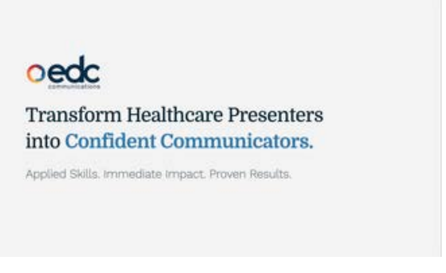
Have tight decks and/or one-pagers for each item in your menu of offerings.

Maintain an objection handling document with example language.

Have a library of case studies to send, as well as “story library” of talking points around those engagements that everyone has access to.

You have a proposal system for quickly building proposals or responding to RPFs.

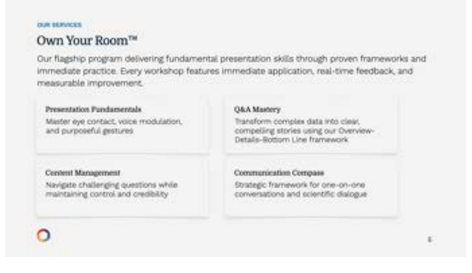


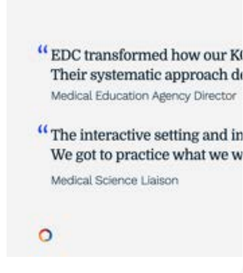


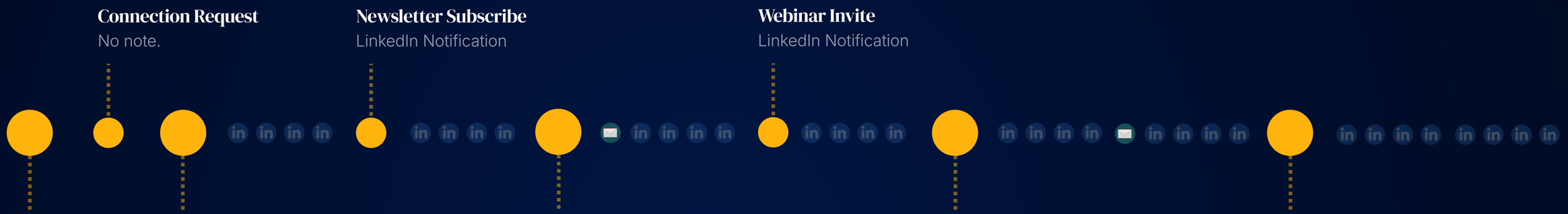












Trigger
Identified as a dream 100 client.

Connection Request
No note.

LinkedIn DM / Email
"Thanks for connecting. Full candor - I've admired Adidas for years, and when we started the firm I wrote them down as a company I'd dream of working with. If I can ever be helpful to you don't hesitate."

Newsletter Subscribe
LinkedIn Notification

In Town DM
"This Spring I'm visiting a client in Portland. I'd love to buy you coffee or a meal while I'm out there."

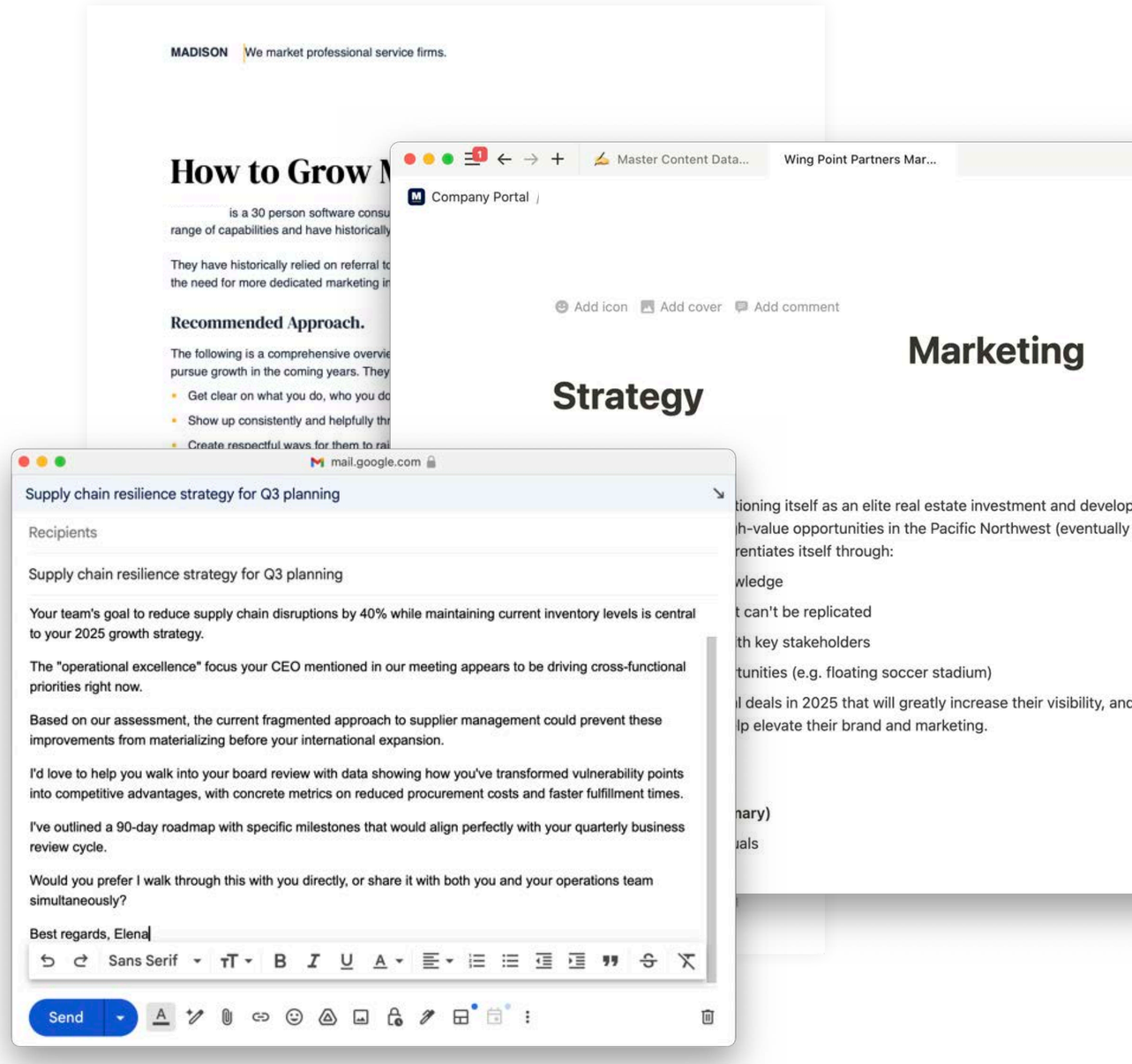
Webinar Invite
LinkedIn Notification

Account -Based Research
"We did a deep dive as a training exercise for our analysts and they chose to use Adidas for the case. They actually uncovered a couple of neat opportunities. I thought you might be interested in what they found - attached."

Private Summit Invite
"We are putting together a private summit of 18-20 execs in the apparel space to discuss innovation. It's in Palm Springs in April, and we have VIP tickets to Coachella as part of the experience. Would love to have you join as my guest."

Equip your champion.

Most of the sale happens when you're not in the room. Give them the tools they need to sell the vision to internal stakeholders.



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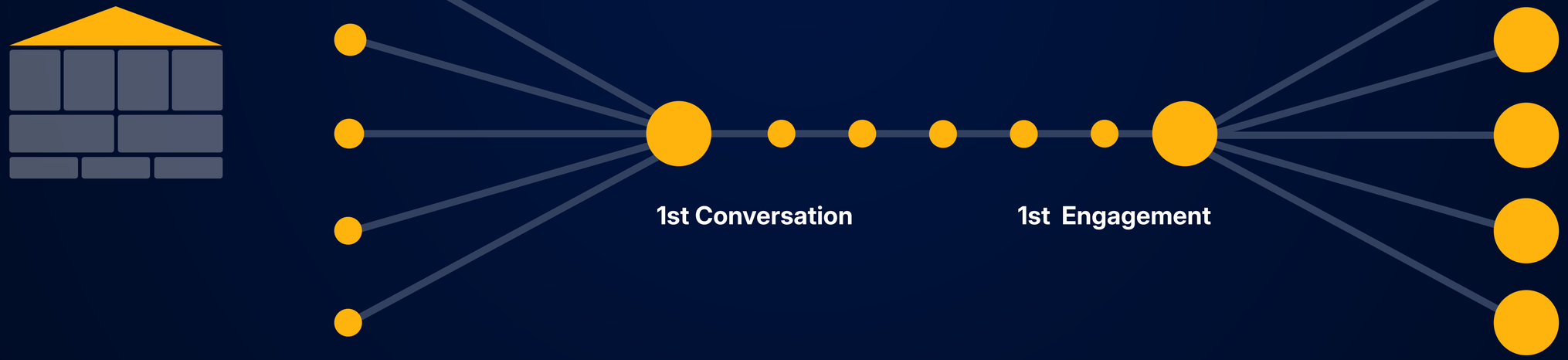
Delivery Excellence

Earn the right to more work. Create raving fans.



About Madison

Madison helps boutique professional service firms grow. We help you:

- Get clarity on your firm's Point of View.
- Transform your team into trusted advisors clients admire and respect.
- Design respectful ways for prospects to raise their hands when they're ready.
- Nurture business development relationships thoughtfully and authentically.









MADISON | We market professional services firms.



★★★★★

Far and beyond the best service provider I've ever worked with in my professional career.

Mackenzie Reynolds - COO, Stansbury-Weaver



★★★★★

Has singlehandedly driven much of the inbound interest we've received since we've been working together.

Austin Harms - Managing Partner, Altum Legal



★★★★★

Our b2b marketing game changers. I only wish I could work with them 24/7.

Kate Blosser - Marketing Director, Archer Education



★★★★★

Marketing masters. I only lament we didn't hire them earlier.

Caleb Oller - Partner, Township

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