

SCALE YOUR AGENCY *with* CARE PLANS

The tactics we've used to build and scale
our maintenance program from \$0 to
over \$500 thousand in recurring revenue.

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INTRODUCTION

If your business depends solely on new projects to survive, you're at risk.

There's NO WAY to predictably find new projects to work on, *no matter what the internet gurus say.*

The risk here is high, and it can take you out of business.

But there's no reason to be scared – even though you can't change the wind, you have a chance to change the direction of your sails.

Building a care solution is what you need



For those of you who don't know me yet, I'm Igor, and I'm the founder of Utimize — a company created to help agencies take all of the technical issues off of their plate while they focus solely on new projects.

We currently manage over 500 websites for our clients, and we've generated over \$500 thousand in recurring revenue over the past year.

We know what it takes to get a product from nothing to being your safe harbor. No matter **how small you are** or **how big you are**, care plans are still the most effective way to drive recurring revenue without having to trade time for money.

But it's not going to be easy. If you're willing to make real progress, you'll have to start taking real actions.

If you're a do-er by nature, this ebook will change your life and the way your agency will grow from here forward.

Action takers get far, so take action, and you will too!

THE TOOLS YOU NEED

I love care plans — in most cases, they are easy to manage and can be a life-saver to both you, the manager, and the client, the business owner.

We manage roughly 500 websites, and our small maintenance department can handle it without any problems, because most of the tasks can be automated.

Any care plan offer must have four essential features:

- Backups (preferably stored off-site)
- Security checks
- Plugins, themes, and core updates (preferably weekly)
- Uptime monitoring

Backups

There are plenty of solutions out there — in our opinion, **UpdraftPlus** is the go-to solution if you're looking for something free.

With this plugin, you can set up daily backups and export them to your preferred storage solution (Dropbox, Amazon SES, FTP, SFTP, and many more).

If you've tested Updraft before and didn't like it for some reason, this is what you should be looking for when trying to find an alternative:

- Option to store the backups elsewhere
- Allows backup schedules
- All-in-one solution — meaning it can create a backup and restore (not all plugins do that)
- Reliable and constantly updated

You can start looking at BlogVault (G-R-E-A-T alternative), BackupBuddy, Duplicator, and BackWPup.

RECOMMENDED



ALTERNATIVES



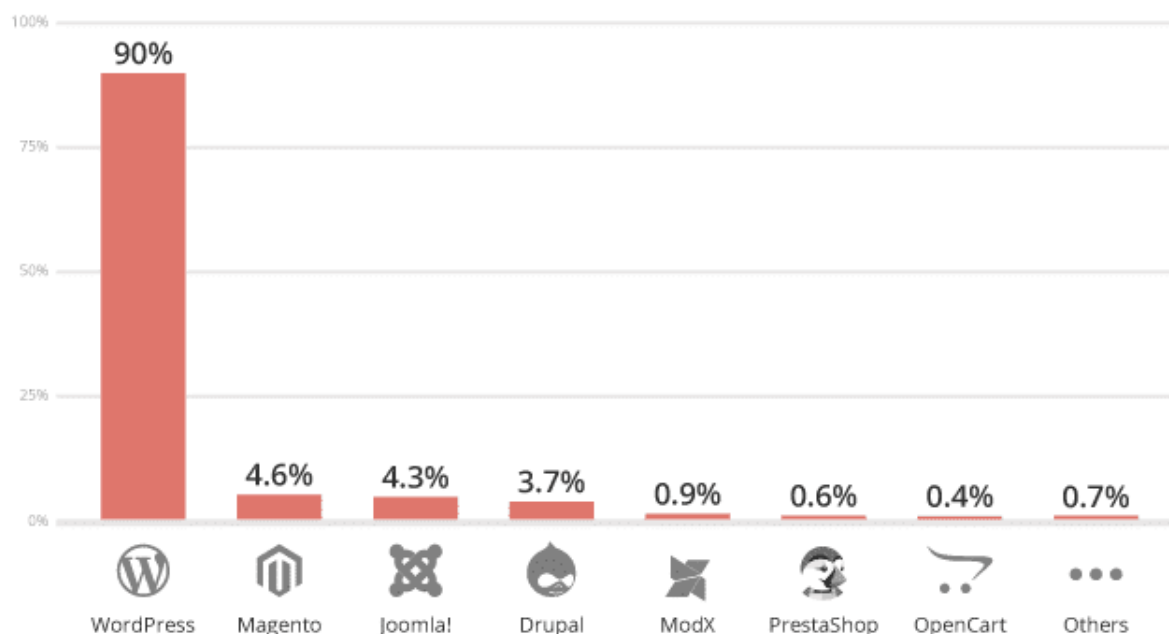
Security Checks

Security is one of the main reasons why I believe every website should use a care solution — prevention is much cheaper than remediation.

Outdated plugins and themes are the #1 cause for hacked websites these days, and yes, you should use this info when convincing your clients of the importance of site security.

Infected Websites Platform Distribution - 2018

(source: Kinsta)



For security, we highly recommend the Sucuri plugin. It helps with hardening, malware scans, and monitoring. All for free!

Alternatively, we also like Wordfence and MalCare.

RECOMMENDED



ALTERNATIVES

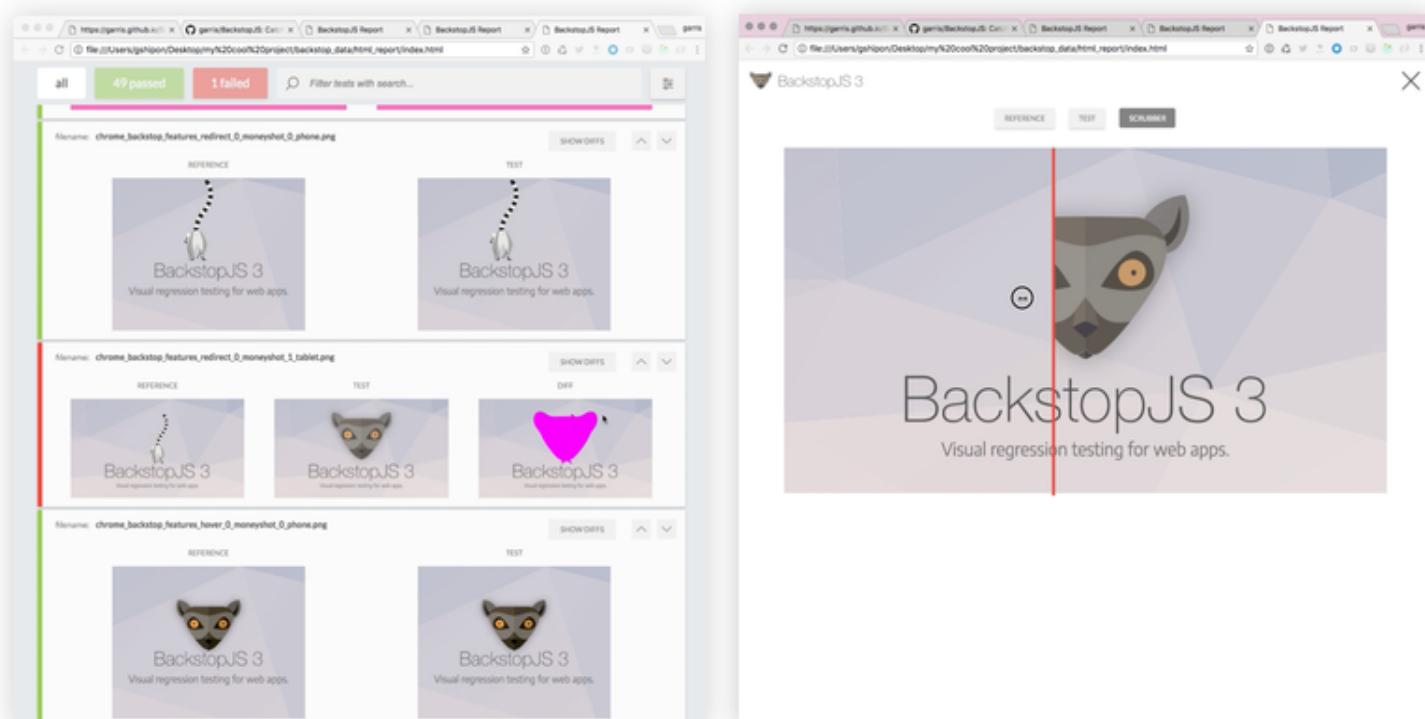


Plugins, Themes, and Core Updates

People have been trying to automate this — and it might be successful for 90% of the websites you manage. But once in a while, something will break, and you must be there to see what happened in order to take immediate action.

That's why I highly recommend making this a manual process, especially if you're onboarding websites from another developer.

The good news is that it doesn't have to be 100% manual, and you CAN automate the quality assurance process — which is likely the most time-consuming part.



For visual regression testing, we love Backstop JS. It's free and has everything you need to automate the QA process throughout your entire development chain.

It might be a little tricky to get it up and running, as it is an open-source solution and requires you to use the 'npm' interface.

A great alternative to that is — it works out of your own browser, for free.

RECOMMENDED



SCREENSTER

ALTERNATIVES



Selenium



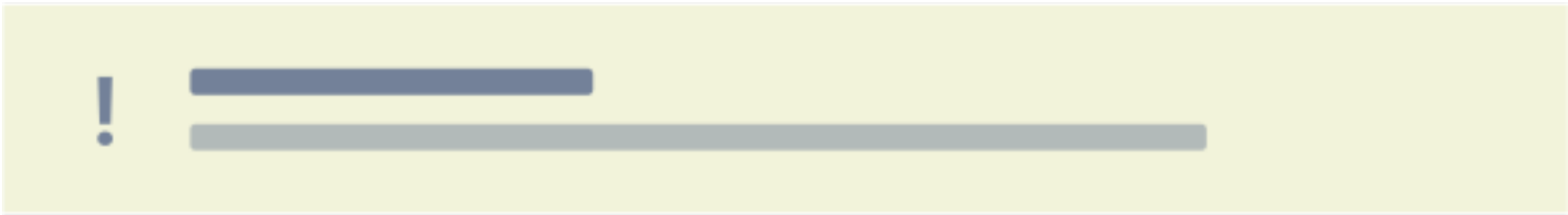
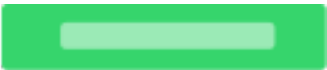
WRAITH

Uptime Monitoring

Overload, DNS issues, PHP errors... if you're running a care solution, being able to monitor whether the website is up or not can give you the time you need to see what's going on and what the next steps should be.

At the time of writing this book, we're using two different uptime monitors – our own and Uptime Robot.

● **UptimeRobot** | Service status



Uptime Robot Website

Operational



Monitoring API

Operational



Alternatively, you can also search for Freshping, Site24x7, Dynatrace, etc.

RECOMMENDED

● **UptimeRobot**

ALTERNATIVES

freshping **Site24x7** dynatrace

The next step

You know... **the essential stuff is usually a cheap commodity.**

If you want this product to be a significant source of revenue, you'll have to charge a couple of hundreds of dollars.

That's where the differentiator comes into play. A few ideas of add-ons are:

SEO Monitoring



Broken Links Monitoring



Performance Monitoring



Malware clean-ups



Performance Optimization



These differentiators can also be a great way to up-sell. For instance, if you noticed the client rankings are falling, you can introduce the opportunity to get this fixed:

*“Hey! I noticed the rankings for this keyword has fallen a lot.
Would you like to schedule a call and see if we can help with that?”*

This is key if you want to build trust and bring your client up in the product chain — where you can charge more in higher-ticket services like consulting, for instance.

PRICING

On average, our clients charge ~\$289/month — but it can vary from \$99 all the way to \$1999 — it really depends on what's inside the package.

How many features are you willing to add? How much will each of them cost?
How much would it cost if you were to hire a developer to do that for you?

To make your life easier, I went ahead and calculated the price of each paid add-on you'll need to run a service with the following features:

Essencial

- Daily backups (*Amazon SES @ \$6/site*)
- Weekly updates (*developer @ \$50/h x 4 times a month*)
- Uptime monitoring (\$7/month)

\$28/website/month

Premium

- Security monitoring (Sucuri @ \$19/web-sitemonth)
- SEO monitoring + Broken Links checker (SEMrush @ \$99/month)
- Malware clean ups (Sucuri @ \$499)
- Performance (developer @ \$50/h x 5 hours)

\$93/website/month

Based on that, we can say each site would cost you roughly \$121/month. We've considered you'd be managing 10 websites in this scenario, but these costs should be diluted as you onboard more sites.

Make a unique offer. Bundle it with a high ticket service — and charge a fair rate that can cover your costs comfortably and yet give you some profit.

RECURRING PAYMENTS

You're about to set up one of the most important systems of your entire company. That's where the safety and peace of mind start. The holy grail: recurring payments.

Ok, that was a little exaggerated, but yet, I'm pretty sure you'll see your company with other eyes from the moment you start collecting your first recurring payments.

And for that to happen, we must set up a reliable system that can put your billing in auto-pilot, because I'm sure you don't want to spend 8 hours invoicing clients.

Accepting Credit Cards

If you're in the business of selling websites, you're probably used to setting this up for your clients, so there's no hidden secret here.

There are plenty of options of payment processors out there. The most famous (and reliable) are Stripe and PayPal. These should serve you well if you're based anywhere in North America or Europe.

RECOMMENDED



Billing Solutions

We've built our own billing system, but this is not needed if you're just starting out.

The beautiful thing about WordPress is its community. There are many great, well-coded alternatives out there that run in WordPress and look as professional as if you were building your own billing system.

To set up recurring payments and create your cart, I recommend the following stack:

WooCommerce Subscriptions (\$199/yr)

It's expensive, I know. But here are some great features:

- Free-trials & set up fees
- Variable subscription based on the client's needs
- Synchronize payments to happen on the same day for all clients (pro rata)
- Multiple subscriptions per client
- Customer emails

WP Simple Pay (\$99/yr)

Cheaper and cleaner. Here are some of its coolest features:

- Payment form builder
- Custom amounts
- Cleanest and simplest interface that increases conversion rates
- Multi-language & multi-currency
- Accept non-card payments through ACH debit payments

THE LAUNCH

I know most people overthink this, so I'll be straight to the point, and hopefully, you can have a direction by the end of this.

If you have a good amount of clients already...

You're ready to get a great revenue bump THIS WEEK. You just need to get in touch with each of your clients.

Phone or email. It doesn't really matter.

I want you to start working on this right now, so I've put together a quick email template you can simply copy, paste and tweak where needed. Send it to ten clients, follow up with a phone call, and if it works out, keep contacting your other



New Maintenance Strategy

Send ↗

Hi Mark,

I hope you're doing great!

Lately, we've been working on a few changes that will have an impact on your website, and that's in a good way.

Just like any other software, WordPress and its dependencies are always evolving. Things are becoming much faster and safer, and it has a clear impact on how effective your website currently attracts new business for you.

From now on, we're transitioning all clients into our care plan over the next 30 days. You could either have us continue to manage your website, or you can do it yourself.

These are all the technical details of what needs to get done on a daily, weekly, and monthly basis:

- Daily backups stored off-site (to ensure there's always a point in the past to restore your website to)
 - Weekly plugins, themes, and core updates (so your website is always vulnerability-free and running fast)
 - Uptime monitoring (to make sure everything is online and available)
 - Broken links checker (to avoid broken user experience – Google doesn't like it)
- [...add other features...]

You can learn more about our care plans in the link below:
[add link to your website]

As I mentioned, we only have 30 days to transition all websites, but I'm ready to get you onboarded today if you want to receive all these benefits immediately.

Please let me know if you have any questions and how you'd like to proceed.

I'd then call the client and use the exact same script as a follow up. If you had a great relationship with them up until now, I'm sure you'll be able to convert the majority of your clients.

If you have no clients...

You can use care plans as a way to acquire new business — mainly because of its low pricing point and because it's a great opportunity to create a solid bridge of trust with high paying clients.

One of my Brazilian friends, Ícaro de Carvalho (one of the biggest names in digital marketing in LATAM) says that **marketing is all about turning seconds into minutes.**

And I believe it applies to pretty much any social interaction. People need to know you well before engaging at a higher level of commitment.

When I first started Utimize, we were 100% focused on care plans for small businesses, and we got our first 50 clients without a dollar spent on advertising.

I'd spend a couple of hours everyday looking at business directories, freelance websites, job boards, Facebook groups, forums, etc. Our two main strategies were:

Asking for validation — when you're first starting out, the strategy of asking people to validate your idea is a great way to get the foot in the door. If it goes through, you'll have testimonials and feedback to tweak your offer based on the market needs.

Justin McGill, the founder of LeadFuze, used this strategy to acquire his first customers:



Justin McGill shared a link. ...

I took the concept of a 7 day startup and did it all in 24 hours to launch a b2b email prospecting and outreach service. I documented my 24 hour journey to launch here: <http://justinmcgill.net/24-hour-product-challenge-twist/>

Hopefully this helps someone. Love to hear what you guys think of this productized service as well!

We got our first clients from a private community called Dynamite Circle, from the creators of the Tropical MBA podcast. I've merged this strategy along with offering an entire month for free — and guess what? Most of the clients we got there still work with us today, even though we've switched our focus to agencies only.

Cold outreach, plain and simple — first and foremost, I don't think cold outreach is all about the numbers. Even if it was, I wouldn't want to play the copy and paste game because it annoys people and creates instant rejection.

When doing cold outreach, we should be looking for full personalization. It's costly and boring sometimes. But at the end of the day, if you don't get any clients, you'll likely still have connected with people who are aligned with what you thought would be your ideal client.



Questions re: {company name}

Send ↗

Hey Dany,

Congratulations on your 1 Booking = 1 Tree initiative. Green companies are the future!

I discovered {company} when going through a few posts on {blog}, which seems to be very well ranked for Airbnb training stuff. I love how you were able to link to {company} on this post.

I'm guessing {blog} is an important source of traffic for {company}, so I've put together a report for this site with a few problems I found that we could fix to improve UX (and maybe improve your SEO rankings as a consequence). Would you like to see it?

Cheers,
Igor



Re: Questions re: {company name}

Hi Igor,

Thanks for the followup.

I've pretty much abandoned {blog} for now and it rolls on autopilot to focus on {company}.

As we grow {company} (full new site coming up for early 2020), I'll revamp AS to teach people how to use {company} to maximize and automate their income on Airbnb from {company}.

Keeps me busy hehe



Re: Questions re: {company name}

Hey Dany,

Is WeChalet just for the US & Canada?

I love the idea and I'm sure it has a brilliant future!

Anyway, count on me if you need any assistance with your WordPress stuff. I'm the owner of Utimize, and we provide unlimited tasks at a flat rate ~ I'd be happy to give you a free week trial if you're interested.

Keep up the great work!

By the time I sent this email, the prospect wasn't ready to engage, but a couple months after that, we connected again and I had the pleasure to work with him.

Always add value, with personalization, and follow up at least 3 times before giving up on a prospect. Repeat.

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