LIVE ONLINE · OCT 27–30 · 12–1 PM EDT

POWER UP 2027

The Landscape Entrepreneur Growth Series

Hosted by **Vanessa McQuade**
VP of Sales & Marketing, Intrigue Media

OCT 27



Jeffrey Scott & Mitch Katz
Jeffrey Scott Consulting

OCT 28



Mark Sedgley
Granum

OCT 29



Kevin Scott
Muskoka Landscapers

OCT 30



Rob Murray
Intrigue Media



YOUR HOST

Vanessa McQuade

VP Sales & Marketing · Co-Owner, Intrigue

→ Started at Intrigue in 2012, partner since 2018

→ Helped 100s of landscape clients scale

→ Mariani Premier Group & Schill

→ **$50M+** in client revenue influenced

→ Spoke at over **25** industry events

Create the **gold standard** in marketing that landscape entrepreneurs can trust to grow their business.

The Lineup

TUE · OCT 27		**The AI Driven Financial Leader** Jeffrey Scott & Mitch Katz · Jeffrey Scott Consulting	Presentation
WED · OCT 28		**Planning for Sustainable Growth in 2027** Mark Sedgley · CEO, Granum	Fireside chat
THU · OCT 29		**Breaking Through Growth Bottlenecks in 2027** Kevin Scott · Owner, Wealthy Landscaper & Muskoka Landscapers	Presentation
FRI · OCT 30		**Turning Revenue Goals Into a 2027 Plan** Rob Murray · CEO, Intrigue Media	Presentation

Power Up 2027 · Every day, 12:00 to 1:00 PM EDT

How each hour runs

12:00 · ~5 MIN

Welcome

A quick hello, introduce today's speaker.

40–45 MIN

The session

Learn from the best in the industry to help you start 2027 off strong!

UNTIL 1:00 PM

Live Q&A

Drop questions in the chat anytime — I'll bring them to the speaker.

✓ **Missed one?** Replays go out the next morning ✓ **Same link** every day



TUESDAY, OCTOBER 27

The AI Driven Financial Leader

Jeffrey Scott & Mitch Katz

Jeffrey Scott Consulting

Using AI and industry benchmarks to find profit opportunities — and testing pricing, staffing, equipment and marketing decisions before you commit.

Becoming an AI-Driven Financial Leader

Mitch Katz & Jeffrey Scott

JEFFREY SCOTT



Why financials feel so heavy

Overwhelming

Pages of reports, and not sure where to start.

Which numbers REALLY matter?

Dozens of lines, and only a few really move profit.

Can’t do it all

Copy every best practice and it won’t fit the budget.

Compared to what?

Budget? Last year? Other companies?



JEFFREY SCOTT

Who We Are



Jeffrey Scott

President

Jeffrey Scott Consulting



Mitch Katz

Director of Operations

Jeffrey Scott Consulting

At Jeffrey Scott Consulting, we help landscape entrepreneurs to

Fix, Scale or Exit

their business.

JEFFREY SCOTT

Leader's Edge Peer Groups



JEFFREY SCOTT

Roadmap Consulting and Coaching



JEFFREY SCOTT

FINANCIAL MASTER CLASS®

WITH

JEFFREY SCOTT

Early Bird Ends Nov 5



JANUARY 7-8, 2027

An AI-driven financial leader...

> uses Artificial Intelligence and benchmarks to analyze financial performance, investigate opportunities, test financial decisions, and improve strategic plans.



Meet Tom

Owner, Green Valley Landscaping

Revenue	Gross margin	Net profit
$3.2M	46.5%	1.2%

Four moves we'll follow today

1
Analyze performance

2
Investigate opportunities

3
Test decisions

4
Improve the plan

1

Analyze

How is Tom really doing?

CRIT: Context, Role, Interview, Task

CONTEXT I own a landscape company with about [$__] in revenue and [__] employees at peak. Our work is a mix of [maintenance / enhancements / design-build / snow]. I want help making better financial decisions. Here is my P&L and Balance Sheet.

ROLE Act as an expert fractional CFO for landscape businesses. Be analytical & direct.

INTERVIEW Interview me to understand my business better.

TASK Build a Financial Health Dashboard and give me three key areas to focus on.

Good answers start with good inputs

Company P&L, balance sheet, division P&Ls and hours

Same period, accrual basis

Company details

Tom got a pretty dashboard. But the AI couldn't tell him what his targets should be.

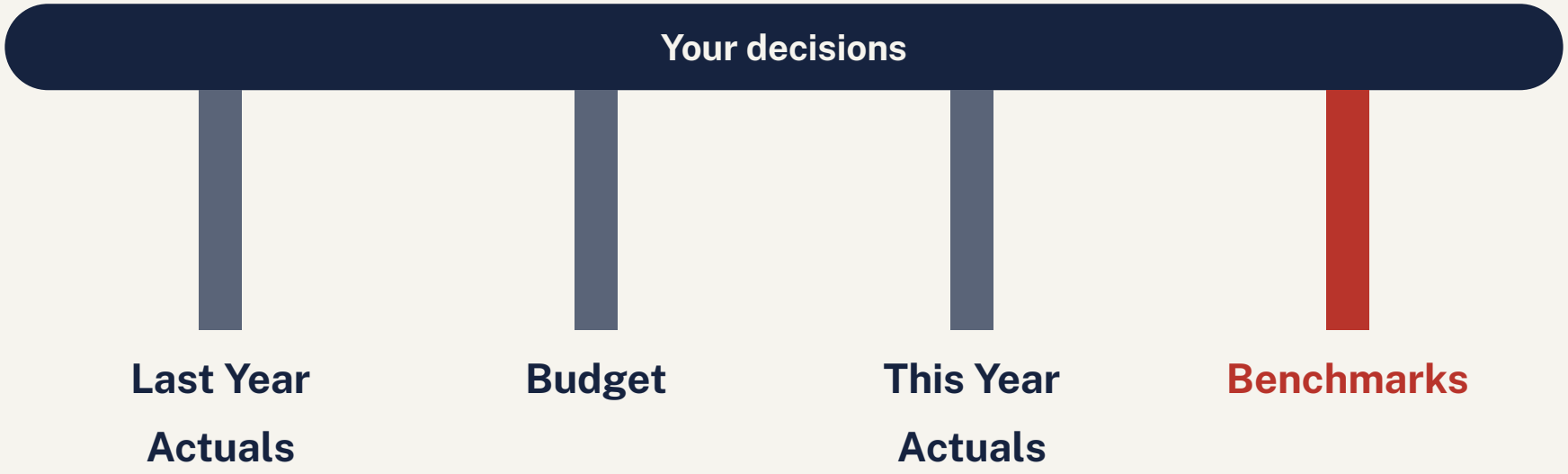
Is a 46.5% gross margin good?

Are my crews productive enough?

Is my management team the right size?



A four-legged stool



The first three compare you to yourself. Benchmarks show what's possible.

Six views of the same business

P&L
Every line, on one standard chart of accounts

Divisions
Margins and labor productivity by service

Pricing & markups
Bill rates, pay rates, material and sub markups

Balance sheet
Cash strength, debt and collections

Staffing
Production vs. office and management team

Growth
Year-over-year growth and profit sharing



Bigger Isn't Better

Bottom 20% by profit

−3.4%

net profit (losing money)

Middle 60%

8.2%

net profit

Top 20% by profit

21.4%

net profit



Profit doesn’t equal cash

“Using my balance sheet and P&L, what are my receivable days, and roughly how much cash would collecting two weeks faster free up?”

Collect faster

Green Valley waits about 54 days to get paid. The typical company in our study waits about 29.



Pay on time, not early

The wider the gap between collecting and paying, the more cash you hold.

Forecast weekly

Know your runway, and set a target for how many weeks of cash you want on hand.

2

Investigate

Why are his numbers what they are?

Better questions get better answers

Dig deeper

"Why is that?" Ask it five times to reach the root cause.

"What's driving this number?"

"What would you do first, and why?"

Check the work

"Show me how you calculated that."

"What assumptions did you make?"

Spot-check one or two numbers yourself.

Which job would you rather sell?

Job A

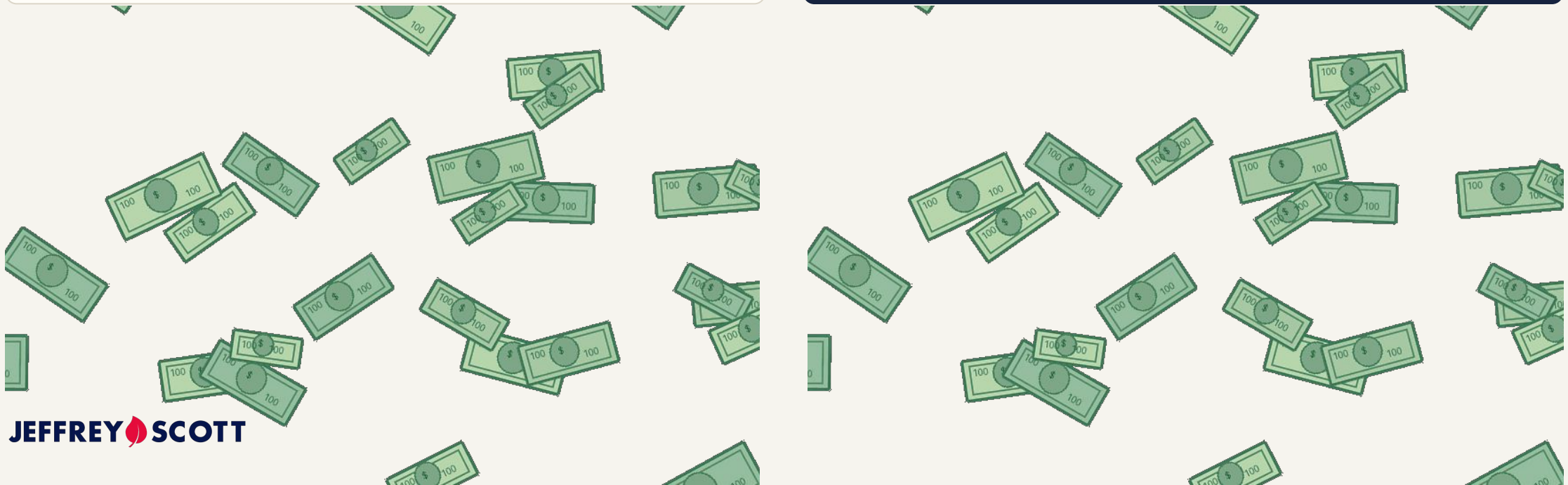
$10,000 · **50% margin** · 50 hours

$120 / hour

Job B

$10,000 · **40% margin** · 20 hours

$220 / hour



JEFFREY SCOTT

What a labor hour can produce

Green Valley maintenance	Maintenance · top 20%	Enhancements · top 20%	Design-build · top 20%
$57	**$83**	**$143**	**$128**



The prompt

“Rank last season’s jobs by throughput and flag any below my $__ floor.”

Sample AI Inquiry

What he asked

“Here are top-20% benchmarks for throughput, receivable days and my P&L. Compare mine. Where are my biggest gaps, what’s driving them, and **what are they worth?”**
Then: “*Why?*” …and again.

What it told him

1. Crews are the biggest gap. Too many hours for the revenue.

2. Management payroll is heavy for the margin it supports.

3. Cash is stuck in slow collections.

Worth well over $200K a year, plus cash freed.

Where Financial Masterclass participants find money

Pricing

Many were surprised by what peers charge and found room to raise rates and markups.

Overhead payroll

What it really takes in managers, sales and office staff to run a company their size.

Leadership Leverage

How well their management team turns payroll into profit.



3

Test

What happens if he makes the move?

“What if I raise prices 5%?”

What our Financial AI tool showed

Profit goes from about **1%** to about **6%** if no customers leave.

Even if a few customers walk, Green Valley still comes out well ahead.

The insight

Pricing is the fastest lever. But margin is still well short of the top 20%.

Pair it with crew productivity.

“What if I hire an operations manager for $85k?”

What our Financial AI tool showed

At today’s margins, the hire puts Green Valley **in the red**.

To pay for itself, it needs a lot of new work, or crews that get noticeably more productive.

The insight

Management payroll is already heavy compared with the top 20%.

Hire with a target: what crew productivity must this role deliver?



“Should I buy it, or grow on my own?”

Cash
How much, how soon, and where it comes from

Margin
Will their work lift or dilute his numbers?

Team
Does he have the managers to run it?

Risk
Customers, people and culture he’d inherit

“A competitor with about $1M in revenue is for sale. Before we evaluate it, tell me what financial and operational information I should ask the seller for, and what questions would tell me whether it will lift or drag my margins.”

SCHILL LANDSCAPE COLLECTIVE

4

Improve

Turn it all into the 2027 plan.

Turn findings into your 2027 budget

Assumptions and targets

- Price increases by service
- Throughput target by division
- Management payroll and hiring plan
- Collections and cash runway
- Equipment and marketing spend

Build the plan

“Turn these decisions into a realistic 2027 budget and monthly targets I can share with my managers.”

Get your own benchmarks



Day 1 · Foundations
P&L, margins and pricing

Day 2 · Advanced
Balance sheet, cash and funding

Bring your team
Team members at half price

JEFFREY SCOTT

The Ultimate Landscape CEO podcast

Throughput, cash and budgets with Derek Wells

Episode 289

The AI-Driven Financial Leader, with Mitch Katz

Episode 287



JEFFREY SCOTT

AI is smart but it's not Mitch and Jeffrey.

If you're unsure what your AI is telling you, talk to an expert.

Questions?

Scan to register

Financial Masterclass

January 7–8, 2027

JEFFREY SCOTT



WEDNESDAY, OCTOBER 28

FIRESIDE CHAT

Planning for Sustainable Growth in 2027

Mark Sedgley

CEO, Granum

Mark has spent 20 years building and scaling software companies, including nine acquisitions. As CEO of Granum, he helps green industry businesses grow sustainably — because the goal isn't bigger, it's better.

About Mark Sedgley



Mark has spent 20 years building and scaling software companies, including stepping in as CEO through founder transitions and leading nine acquisitions.

As CEO of Granum, he is focused on helping green industry businesses grow sustainably with intuitive, connected software.

"Our customers work hard. Moreover, they are creating jobs all over North America by serving their customers. We take the job of supporting our customers improve their business, despite limited time, budget and bandwidth, very seriously."

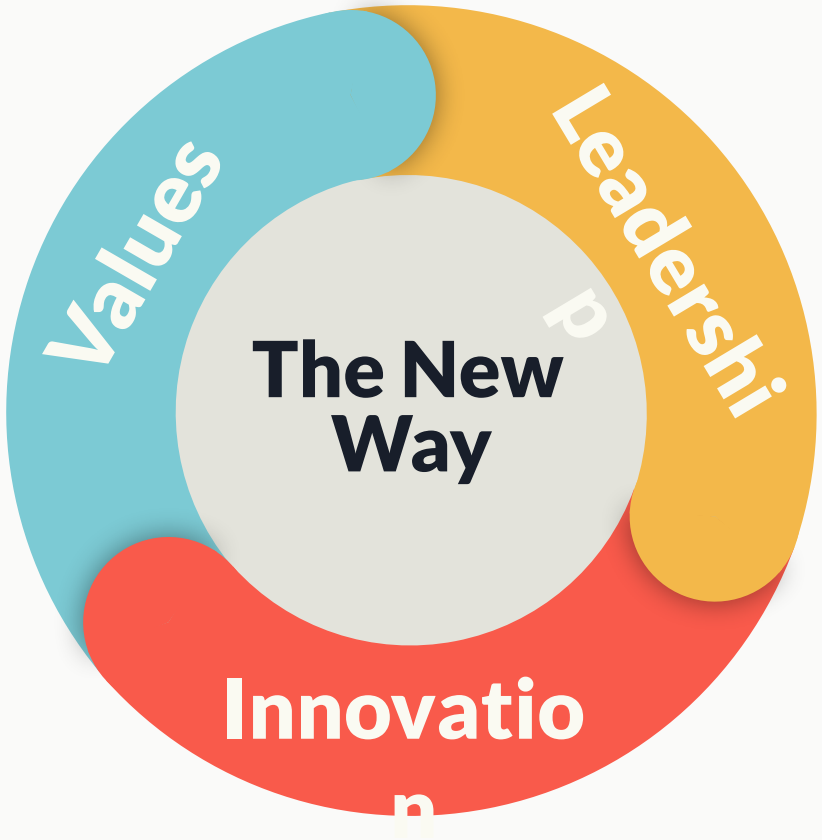
Better, not bigger. Why values first?

Why This Matters Now

It’s not about bigger, it’s really about better. The path forward is **values first** .



vs.



When you say values, what do you mean?

GRANUM intrigue

Values

When we say values, we don't mean these...

Honesty

Integrity

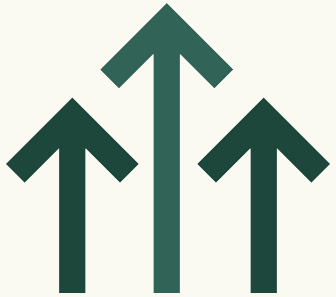
Respect

These are Capstone Values.

Operational Values Drive Results



We Before Me



The Extra 1%



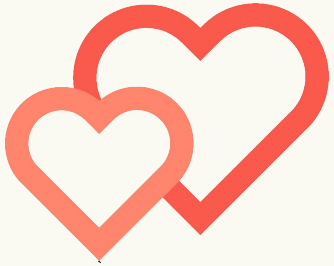
Bias To Act



Unconditional Transparency



Accountable to Outcomes



Forgiveness

What three shifts should owners plan around for 2027?

Three Shifts To Plan Around For 2027

1

Customers expect faster, more professional service

2

Crews have to be trained to stay

3

Software and AI are moving from reports to decisions

Growth exposes complexity. Where does it show up first?

Growth does not create complexity. It exposes the complexity already there.

Before selling more, what should an owner ask?

The question is not *“Can we sell more?”* It’s *“What happens when we sell more?”*

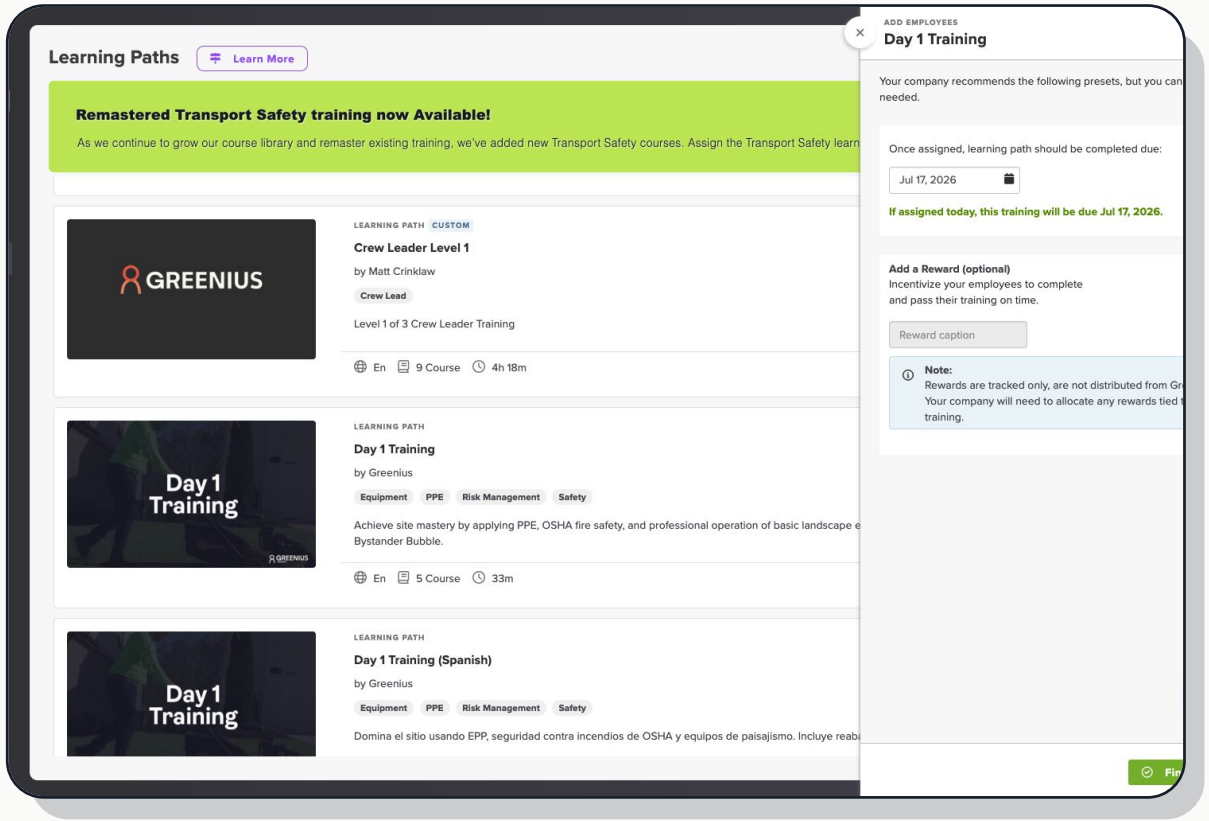
What do the best operators do differently with their people?

Best in Class

What the best operators do differently:

Stronger Team, Better Outcomes

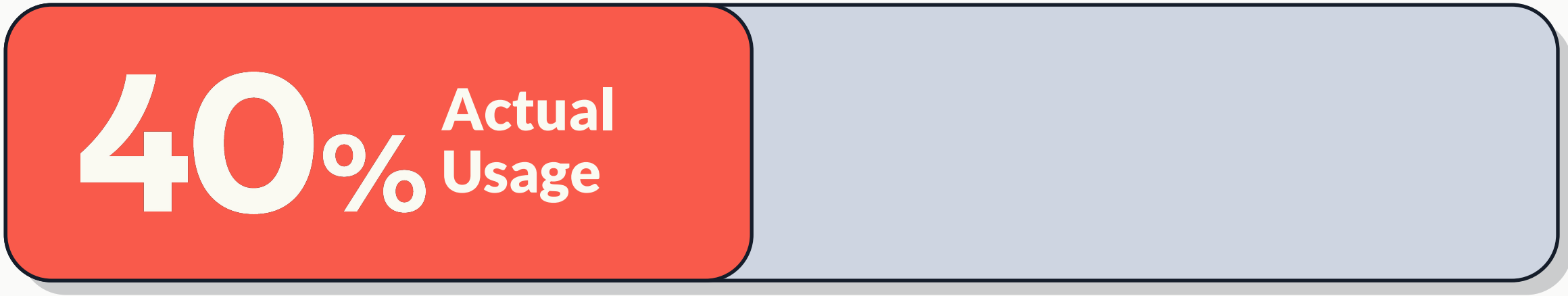
- Standardize Reporting
- Communicate Relentlessly
- Ongoing Reinforcement
- Shared Execution Language
- Train, Train, Train



What is adoption debt, and how do you know you have it?

Adoption Debt

The gap between what your system can do and what your team actually uses.



Where is AI actually changing a contractor's week?

What If You Could Simply Ask Your Business?

That's where LMN comes in… just *Ask*LMN.

"Which jobs missed their estimated labor hours?"

"Where are overtime costs increasing?"

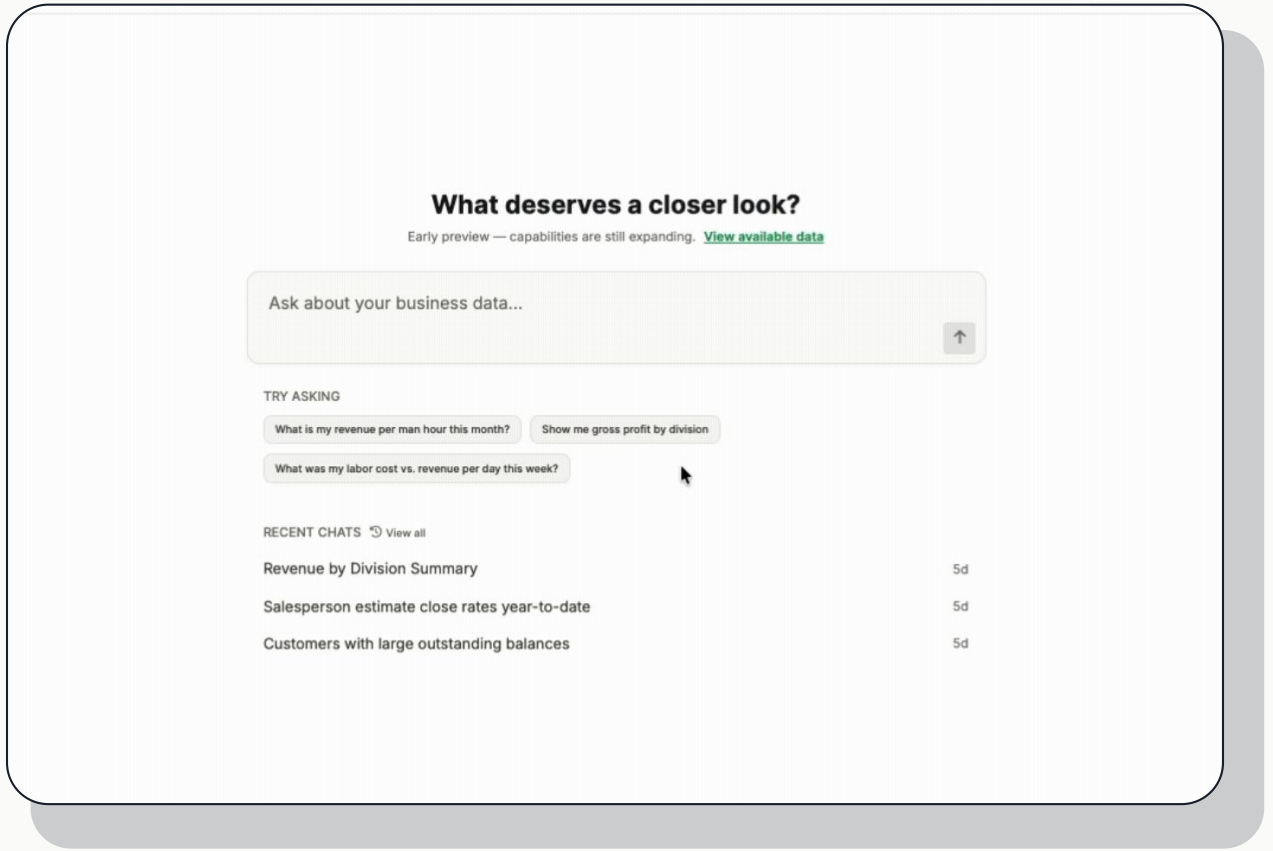
"Which services produced our strongest margins?"

"What changed this month?"

AskLMN

Knowing your numbers is easier than ever by simply asking LMN

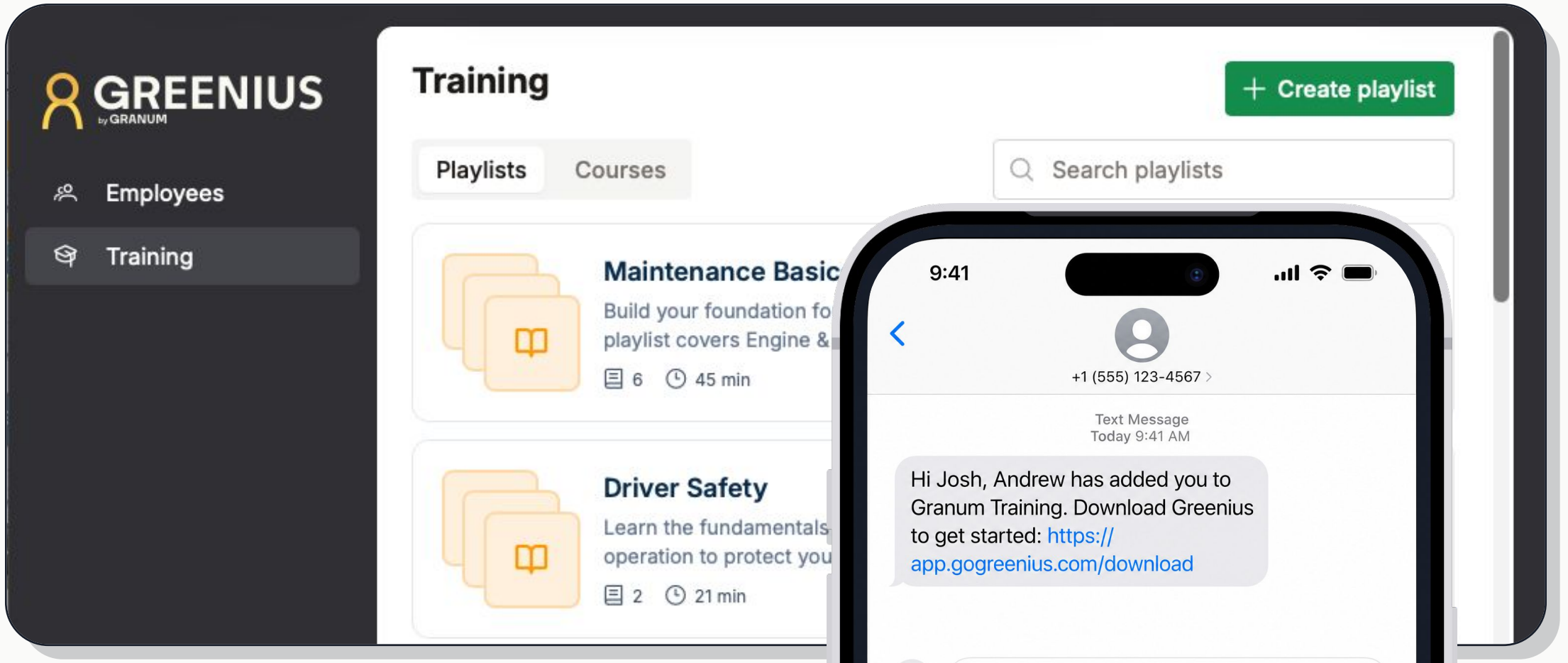
- No more hunting through dashboards and reports to understand the ins and outs of your business - chat with your data to get insights faster than ever
- Create charts and tables to visualize your information clearly
- Review chat history to revisit chats you found most helpful



Where does the new Greenius fit for crews?

Meet the new Greenius

A simpler way to onboard, train and develop your crews – ***Available Now!***



If an owner does one thing before January, what is it?

If You Want to Grow in 2027…

1. Identify the real constraint.
2. Know the economic threshold.
3. Make one process independent of you.
4. Replace one assumption with evidence.
5. Prepare someone else to carry the standard.

Any Questions?

GRANUM intrigue

POWER UP 2027

Thank You for Attending *Planning for Sustainable Growth in 2027*

Pick one move.
Do it before January.

Mark Sedgley CEO, Granum





THURSDAY, OCTOBER 29

Breaking Through Growth Bottlenecks in 2027

Kevin Scott

Owner, Wealth Landscaper & Muskoka Landscapers

Building a company that doesn't depend on the owner for every decision — and how waste quietly erodes profit.

INTRIGUE MEDIA · LIVE WEBINAR

Get Your 2027 Plan Before the Year Starts

People and process, getting out of your own way, and the waste nobody is tracking

Kevin Scott · The Wealthy Landscaper

THE
WEALTHY
LANDSCAPER

This is a conversation. Drop questions in the chat anytime.

01

People & process

Clear roles, clear owners, a rhythm that holds

02

Stop being the bottleneck

Get decisions off your desk without losing control

03

Waste: the silent killer

Find the leaks, fix them with SOPs and standards

01

People & Process

A good person in a broken process loses every time.

People without process

Talent, effort, and a different result on every job

Process without people

A binder on a shelf that nobody owns or follows

Every person on your team should answer three questions

What do I own?

The outcomes that are mine, not just the tasks I do

→ **A written role**

What does good look like?

The standard, so “done” means the same thing to everyone

→ **SOPs and standards**

How do I know I’m winning?

A number they can see every week without asking you

→ **A scorecard**

One name in every box

Leadership
Vision, culture, hiring the leaders

Systems
Operations, SOPs, scheduling, equipment

Financials
Estimating, job costing, cash, KPIs

Growth
Sales, marketing, client experience

Two names in a box? Nobody owns it.

Your name in every box? You found the bottleneck.

A meeting rhythm keeps people and process connected

Meeting	Who	Purpose
Monday huddle	Whole team	Wins, the week's plan, monthly KPIs
Weekly 1-on-1s	Leader + report	Their agenda, sent the day before
Friday review	Leads	Close out the week, lock next week
90-day planning	Owner + leaders	Set the few priorities that matter

02

Stop Being the Bottleneck

QUICK SELF-TEST · COUNT YOUR YESES

Are you the bottleneck?

- Does every quote or price cross your desk?
- Do jobs slow down when you're on vacation?
- Is your phone ringing before 7am with "where are we going today?"
- Are you the only one who knows the numbers?
- Do you run every meeting?
- Could the business run two weeks without you?

Three things owners tell themselves

“It’s faster if I just do it.”	True today. False every day after.
“Nobody does it like I do.”	Then write down how you do it.
“I’ll train them when it slows down.”	It never slows down.

Your capacity becomes the company's ceiling.

Every decision waiting on you is a crew waiting, a client waiting, and a leader who never learns to decide.

Everything that hits your desk: keep, delegate, or document

Keep

Only you can do it: vision, key relationships, hiring leaders, the 90-day plan

Delegate

Someone else can do it with a clear standard and the authority to decide

Document

It happens more than twice, so it becomes an SOP and leaves your head

I stopped running the meetings

The team runs the weekly meeting

They build it, run it, and send a summary with my action items

1-on-1s start with their list

Bullet points arrive the day before, so they own the agenda

The huddle leader rotates

Different leaders present the KPIs; the win-sharer is picked at random

I keep the 90-day plan

I set direction; they run everything in between

DO THIS BEFORE JANUARY

Your 30-day handoff

WEEK 1

Track it

Write down every question and decision that comes to you

WEEK 2

Sort it

Put each one in keep, delegate, or document

WEEK 3

Hand it off

Pass on your top three with a written standard

WEEK 4

Don’t rescue

Coach the result. Don’t take it back.

03

Waste: The Silent Killer

What 5% waste really costs

$50,000

5% waste on $1M in revenue

+$7,500

The 15% net you would have made on it

+50%

Work you never got to because of waste and rework

$86,250

Total impact, every year

Now imagine you're a $5M company: $431,250

Where is the waste?

Deliveries	Poor planning	Leaving site	Wrong grades
Wrong tools	Wrong people	Wrong drawings	Warranty work

The waste nobody tracks

Planning

- Poor forecasting
- Poor job handover
- Not being prepared
- No time clarity for execution

On site

- Leaving early
- Extended breaks
- Not finishing the day
- Duplicate work

Logistics

- Empty trucks
- Route density
- Wrong equipment
- Subcontractor communication

After the job

- Legacy warranty work
- Maintenance damage repairs
- Deposit returns
- Safety issues and injuries

Five hot spots to check this week

Overdigging

Wastes material, time and trucking

What causes it on your jobs?

Staging

Material in the wrong spot gets moved twice

How do you stage today?

Inventory

Counts must be accurate or you buy twice

How do you track it?

Clean-up

Dust control and daily tidy-up, enforced

What works for your crews?

Time

No targets means no efficiency

How do you track hours?

How do we fix this?

1

SOPs

How we do the work, step by step, written down

2

Standards

How we behave, so the SOP actually gets followed

3

Implementation

Training, clear communication channels and tools like 5@3, Leanscaper and Granum

A good SOP removes the guesswork

1 · Confirm the site

Utilities, sub-grades, compaction, protect the house

2 · Prep materials and tools

Stage close to the work; full tool list, charged batteries

3 · Verify the layout

Matches the approved design, signed off by the job planner

4 · Install

Joint rules, conduits first, the right crew of three

5 · Quality and safety

Check layout as you go; PPE and dust control

6 · Clean up

Wash, sweep, photograph the finished work

Standards your crews can repeat from memory

Be on time, every time for shifts, meetings and clients

Respect the plan: follow the SOPs we agreed on

Keep the site tidy: a clean site is a productive site

Show up prepared with the tools and the plan

Own your mistakes: fix them, learn, move on

Respect time: yours, the client's and the team's

THE ONE THING TO DO BEFORE 2027

Run a waste audit on your entire business

Every role

Where does each person lose time?

Every process

Where does work get redone or wait?

Every vendor

Where are you overpaying or under-served?

All the way down the line.

Questions?

Thank you for your time.

Kevin Scott

kevin@thewealthylandscaper.community

thewealthylandscaper.community

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FRIDAY, OCTOBER 30

Turning Revenue Goals Into a 2027 Plan

Rob Murray

CEO, Intrigue Media

Turning a 2027 revenue target into a sales and marketing plan — working back to the leads and budget you need.

POWER UP 2027

Turning Revenue Goals Into a **2027 Plan**

The customers, leads, and investment behind your revenue target

Rob Murray, CEO Intrigue Media



ROB MURRAY

Co-founder & CEO

- Personally Responsible for over $50,000,000 in Sales
- Over 130 Landscape Clients in North America
- Mariani Premier Group Lead Gen Partner
- Interviewed over 100 of the Top Leaders in Landscaping

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> **Our growth is constrained between our ears.**

Questions we here all of the time!

How much should I invest?

What does good results look like, what should I expect?

How do I figure out who to hire? Everyone says they can crush it 😧

Does digital marketing actually get the right kind of customers I want?

WHERE WILL THE REVENUE COME FROM?

“You’ve set your 2027 revenue target. **How much of it can you explain today?** ”

The spreadsheet says 15% profit

ORIGINAL BUDGET

8%

profit

Add more sales

>>>>>>>>>>>>>



REVISED BUDGET

15%

profit

What makes ***those sales*** happen?

The decisions behind the number

01	Revenue and profit goals
02	Existing revenue
03	New customers
04	Quotes and leads
05	Budget
06	Timing and capacity

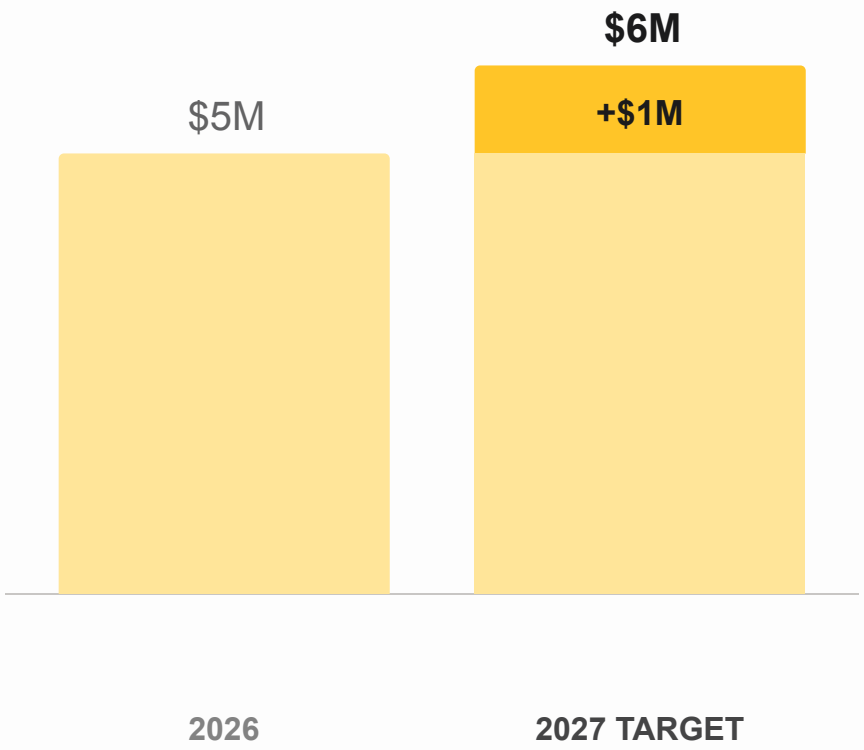
PART 1

HOW MUCH BUSINESS DO YOU NEED?

- Revenue & Profit Goals

Your 2027 revenue and profit goals

2026 revenue	$5 million
2027 revenue target	**$6 million**
Required growth	**$1 million**
Target operating profit margin	_____ %



Revenue already in the plan

CONFIRMED

Contracted work for delivery in 2027

Locked

EXPECTED

Additional expected work from current and past customers

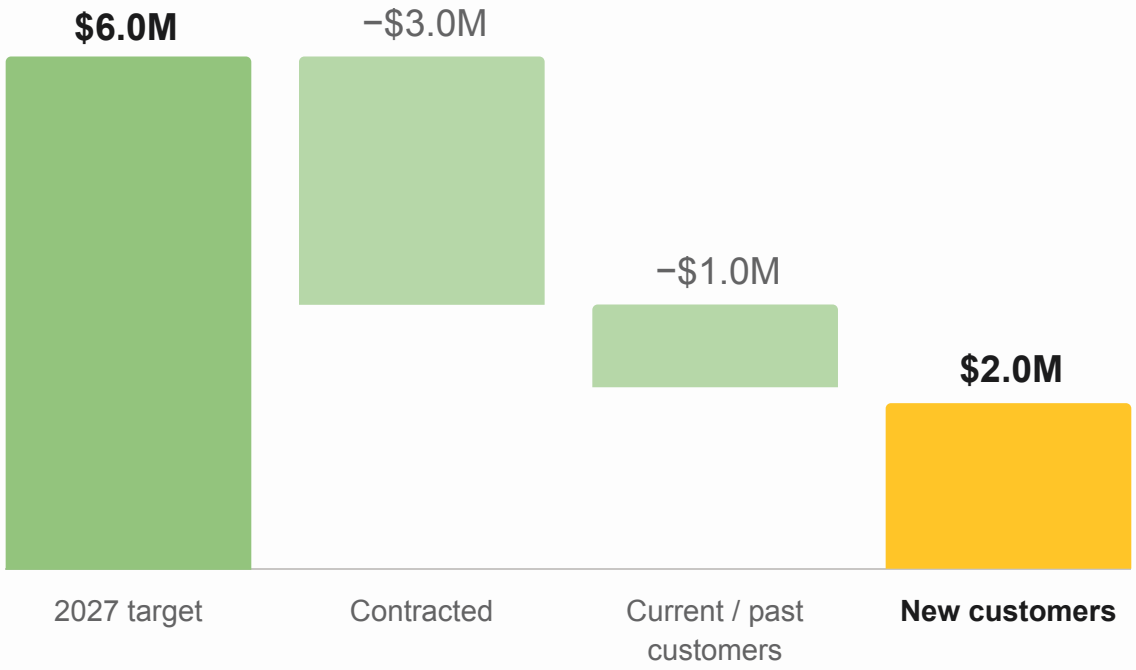
Do you know this?

THE GAP

Revenue needed from new customers

Today

$1 million of growth can require $2 million of new customers



REVENUE COMPONENT	AMOUNT
2027 target	**$6,000,000**
Less contracted 2027 revenue	($3,000,000)
Less additional expected revenue from current/past customers	($1,000,000)
Revenue required from new customers	**$2,000,000**

The work you want to win

Service mix	Ideal customer
Geography	Gross margin
Repeat revenue	Operational fit



AUDIENCE EXERCISE · WRITE DOWN

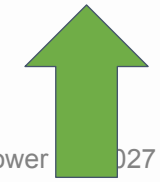
1. Your revenue target.
2. Revenue expected from contracted and existing-customer work.
3. The remaining new-customer revenue gap.
4. The services you want that revenue to come from.

Where to Focus? Exercise.

B	C	D	E	F	G	H	I	J	K	L
	Revenue	Type of Customer	Type of Work	Profit Margin	Gross Profit	Years as Custome	LTGP	Owner Dependen	Customer Satisfact	Fun to do!
Customer 1	65000	Residential	Design Build	40%	26000	1	26000	Zero	High	Yes
Customer 2	85000	Residential	Design Build	39%	33150	1	33150	Low	Medium	Yes
Customer 3	18000	Residential	Maintenance	45%	8100	7	56700	Zero	High	Yes
Customer 4	14000	Residential	Maintenance	48%	6720	7	47040	Zero	High	Yes
Customer 5	8000	Residential	Maintenance	45%	3600	7	25200	Zero	High	Neutral
Customer 6	8000	Residential	Maintenance	46%	3680	7	25760	Zero	High	Neutral
Customer 7	150000	Residential	Design Build	38%	57000	1	57000	Medium	Medium	Neutral
Customer 8	165000	Residential	Design Build	40%	66000	1	66000	Medium	High	Yes
Customer 9	300000	Commercial	Construction	22%	66000	1	66000	High	Medium	No
Customer 10	62000	Residential	Design Build	40%	24800	1	24800	Low	High	Yes
Customer 11	37500	Commercial	Maintenance	35%	13125	3	39375	Zero	Medium	Neutral
Customer 12	29000	Commercial	Maintenance	35%	10150	3	30450	Zero	Medium	No
Customer 13	95000	Residential	Design Build	38%	36100	1	36100	High	Medium	Neutral
Customer 14	60000	Residential	Design Build	45%	27000	1	27000	Zero	High	Yes
Customer 15	45000	Commercial	Maintenance	35%	15750	3	47250	Low	Medium	No
Customer 16	125000	Residential	Design Build	35%	43750	1	43750	Medium	Medium	No
Customer 17	80000	Residential	Design Build	42%	33600	1	33600	Low	High	Yes

Where to Focus?

B	C	D	E	F	G	H	I	J	K	L
	Revenue	Type of Customer	Type of Work	Profit Margin	Gross Profit	Years as Custome	LTGP	Owner Dependen	Customer Satisfact	Fun to do!
Customer 9	300000	Commercial	Construction	22%	66000	1	66000	High	Medium	No
Customer 8	165000	Residential	Design Build	40%	66000	1	66000	Medium	High	Yes
Customer 7	150000	Residential	Design Build	38%	57000	1	57000	Medium	Medium	Neutral
Customer 16	125000	Residential	Design Build	35%	43750	1	43750	Medium	Medium	No
Customer 13	95000	Residential	Design Build	38%	36100	1	36100	High	Medium	Neutral
Customer 2	85000	Residential	Design Build	39%	33150	1	33150	Low	Medium	Yes
Customer 17	80000	Residential	Design Build	42%	33600	1	33600	Low	High	Yes
Customer 1	65000	Residential	Design Build	40%	26000	1	26000	Zero	High	Yes
Customer 10	62000	Residential	Design Build	40%	24800	1	24800	Low	High	Yes
Customer 14	60000	Residential	Design Build	45%	27000	1	27000	Zero	High	Yes
Customer 15	45000	Commercial	Maintenance	35%	15750	3	47250	Low	Medium	No
Customer 11	37500	Commercial	Maintenance	35%	13125	3	39375	Zero	Medium	Neutral
Customer 12	29000	Commercial	Maintenance	35%	10150	3	30450	Zero	Medium	No
Customer 3	18000	Residential	Maintenance	45%	8100	7	56700	Zero	High	Yes
Customer 4	14000	Residential	Maintenance	48%	6720	7	47040	Zero	High	Yes
Customer 5	8000	Residential	Maintenance	45%	3600	7	25200	Zero	High	Neutral
Customer 6	8000	Residential	Maintenance	46%	3680	7	25760	Zero	High	Neutral



Where to Focus?

	B	C	D	E	F	G	H	I	J	K	L
		Revenue	Type of Customer	Type of Work	Profit Margin	Gross Profit	Years as Custom	LTGP	Owner Dependen	Customer Satisfact	Fun to do!
	Customer 8	165000	Residential	Design Build	40%	66000	1	66000	Medium	High	Yes
	Customer 9	300000	Commercial	Construction	22%	66000	1	66000	High	Medium	No
	Customer 15	45000	Commercial	Maintenance	35%	15750	4	63000	Low	Medium	Yes
	Customer 7	150000	Residential	Design Build	38%	57000	1	57000	Medium	Medium	Neutral
	Customer 11	37500	Commercial	Maintenance	35%	13125	4	52500	Zero	Medium	No
	Customer 3	18000	Residential	Maintenance	45%	8100	6	48600	Zero	High	Neutral
	Customer 16	125000	Residential	Design Build	35%	43750	1	43750	Medium	Medium	No
	Customer 12	29000	Commercial	Maintenance	35%	10150	4	40600	Zero	Medium	No
	Customer 13	95000	Residential	Design Build	38%	36100	1	36100	High	Medium	Neutral
	Customer 4	12000	Residential	Maintenance	48%	5760	6	34560	Zero	High	Neutral
	Customer 17	80000	Residential	Design Build	42%	33600	1	33600	Low	High	Yes
	Customer 2	85000	Residential	Design Build	39%	33150	1	33150	Low	Medium	Yes
	Customer 6	12000	Residential	Maintenance	46%	5520	6	33120	Zero	High	Neutral
	Customer 5	12000	Residential	Maintenance	45%	5400	6	32400	Zero	High	Neutral
	Customer 14	60000	Residential	Design Build	45%	27000	1	27000	Zero	High	Yes
	Customer 1	65000	Residential	Design Build	40%	26000	1	26000	Zero	High	Yes
	Customer 10	62000	Residential	Design Build	40%	24800	1	24800	Low	High	Yes



Where to Focus?



	Revenue	Type of Customer	Type of Work	Profit Margin	Gross Profit	Years as Custome	LTGP	Owner Dependen	Customer Satisfact	Fun to do!
Customer 8	$165,000	Residential	Design Build	40%	$66,000	1	**$66,000**	Medium	High	Yes
Customer 3	$18,000	Residential	Maintenance	45%	$8,100	7	**$56,700**	Zero	High	Yes
Customer 4	$14,000	Residential	Maintenance	48%	$6,720	7	**$47,040**	Zero	High	Yes
Customer 17	$80,000	Residential	Design Build	42%	$33,600	1	$33,600	Low	High	Yes
Customer 2	$85,000	Residential	Design Build	39%	$33,150	1	$33,150	Low	Medium	Yes
Customer 14	$60,000	Residential	Design Build	45%	$27,000	1	$27,000	Zero	High	Yes
Customer 1	$65,000	Residential	Design Build	40%	$26,000	1	$26,000	Zero	High	Yes
Customer 10	$62,000	Residential	Design Build	40%	$24,800	1	$24,800	Low	High	Yes
Customer 9	$300,000	Commercial	Construction	22%	$66,000	1	$66,000	High	Medium	No
Customer 15	$45,000	Commercial	Maintenance	35%	$15,750	3	$47,250	Low	Medium	No
Customer 16	$125,000	Residential	Design Build	35%	$43,750	1	$43,750	Medium	Medium	No
Customer 12	$29,000	Commercial	Maintenance	35%	$10,150	3	$30,450	Zero	Medium	No
Customer 7	$150,000	Residential	Design Build	38%	$57,000	1	$57,000	Medium	Medium	Neutral
Customer 11	$37,500	Commercial	Maintenance	35%	$13,125	3	$39,375	Zero	Medium	Neutral
Customer 13	$95,000	Residential	Design Build	38%	$36,100	1	$36,100	High	Medium	Neutral
Customer 6	$8,000	Residential	Maintenance	46%	$3,680	7	$25,760	Zero	High	Neutral
Customer 5	$8,000	Residential	Maintenance	45%	$3,600	7	$25,200	Zero	High	Neutral
							$40,304			

We'll send this sheet with the slides 👍

Where to Focus?

When we know what we're after, we can make it happen!!

PART 2

WHAT HAS TO HAPPEN TO WIN THAT BUSINESS?

- New Customers Required

New customers required

WORKED EXAMPLE

New-customer revenue required		Average 2027 revenue per new customer		**New customers**
$2,000,000	÷	$50,000	=	**40**

What will count as 2027 revenue?

Signed contract value and revenue delivered in 2027 can differ.

WORKED EXAMPLE · ANNUAL MAINTENANCE AGREEMENT

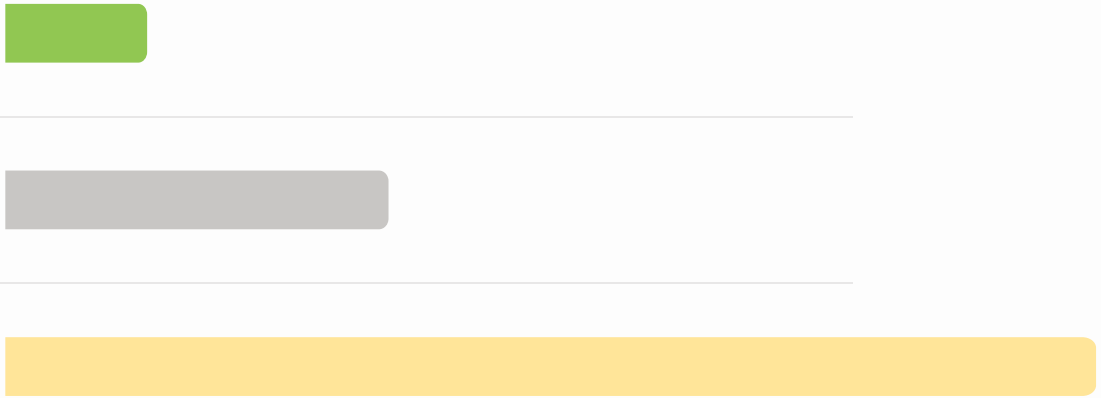
Signed value **$12,000**



A $12,000 annual maintenance agreement contributing half its annual service revenue during 2027 contributes **$6,000** toward that year's target.

Quotes and leads required

STAGE	CALCULATION	REQUIRED
Customers	$2M ÷ $50K	**40**
Quotes	40 ÷ 40% quote-to-sale rate	**100**
Leads	100 ÷ 33% lead-to-quote rate	**300**



The cost of a weak sales process

QUOTE-TO-SALE RATE	CUSTOMERS	QUOTES	LEADS AT 50% LEAD-TO-QUOTE
20%	40	200	**400**
40%	40	100	**200**

What does Good look like?

- ✅ 5 Minute Lead Response
- ✅ 5 - 8 Follow Ups - Polite Persistence
- ✅ Friendly :)
- ✅ Only qualified visits
- ✅ Understand the purpose and the outcome the client is hoping for.
- ✅ Budget!!! Not realistic? Phased approach.
- ✅ Reason for decision.
- ✅✅✅✅✅ CRM Pipeline!!!

Lead Response

Speed Matters: The “5-Minute Rule”

- Leads contacted within 5 minutes are 100x more likely to be reached and 21x more likely to be qualified compared to those contacted after 30 minutes.
  (Source: Harvard Business Review)

Drop-off in Conversion with Delayed Response

- The odds of qualifying a lead drop by 400% if the response time increases from 5 minutes to 10 minutes. *(InsideSales.com)*
- 78% of customers buy from the first company that responds to them. *(LeadConnect.io)*

Effectiveness of Multiple Follow-ups

- 80% of sales require 5 follow-ups, yet 44% of sales reps give up after just one follow-up. *(Invesp)*
- 50% of leads never get a second follow-up. *(InsideSales)*

Lead Response

Polite Persistence

Phone back within 5 minutes.

Email 1 - Right away.
Hi John, I left you a voicemail and wanted to make sure we had an opportunity to connect you can reply to this email or call me at 555-55555 looking forward to connecting to see if we're even no position to help you accomplish what you're hoping with your landscape project

Email 2 - Next Day.
Hi John, I left a voicemail yesterday and sent a note. I wanted to let you know that we we don't forget about our customers and we're following up to make sure you know that we're here to support you. You can reach me anytime by replying to this email or give me a call at 555-5555. If you'd like to book a time for a quick call you can use the scheduling link add to find a time that works for you.

Email 3 - 2 Days after inquiry.
Hi again John, I don't want to be pest, I just wanted to let you know that taking care of our customers is a priority, and I'm going to follow up essentially until you tell me not to we're looking forward to helping you. I know things can get busy but I'll keep sending you a note here and there so that you know we’re here to support you if you need anything.

Lead Response

Polite Persistence

Email 4 - 3 Days after inquiry.
Hi John it's Rob again :) I'm going to keep following up unless you tell me to stop I know life can get in the way when you're trying to figure out a big project like landscaping, so I'll keep following up just to make sure you know that you've got someone here to support you.

Email 5 - 4 Days after inquiry.
Hi John maybe the landscape project isn't a priority anymore? if that's the case all good just let me know. Talk soon.

Email 6 - 5 Days after Inquiry. hi John I haven't heard back by now you probably know that taking care of customers is something we take very seriously but the last thing I want to be is someone bugging you so if this is something that you decided to not pursue or you found a solution already it's all good let me know

Email 7 - 7 Days after Inquiry.
Hi John, Rob one last time I want to let you know that we're here if you ever need us I'm going to close the file for now but if you're ever looking for support and figuring out what you need for your landscape project reach out anytime you can reply to this email or call me at 555-5555 wishing you all the best. You can always book a time in my calendar here.

I'll send over some resources over the next few weeks/months on best practices for designing a landscape project that I'm sure you'll find helpful.

Lead Response

Sales Stage - Ghosted

Create trigger.

Send Ghosted Drip. Add to Newsletter List.

Email 1 - 2 weeks after set to stage
Inspiration

Email 2 - 4 weeks after set to stage
What a good discovery and design process looks like

Email 3 - 8 weeks after set to stage
What some of our clients have to say.

Email 4 - 12 weeks after set to stage
Meet our founder.

Mix in Channels

- Email
- Phone
- **SMS**
- Calendar Bookings

Lead Response

Sales Stage - Ghosted
Create trigger.

Send Ghosted Drip. Add to Newsletter List.

Email 1 - 2 weeks after set to stage
Inspiration

Email 2 - 4 weeks after set to stage
What a good discovery and design process looks like

Email 3 - 8 weeks after set to stage
What some of our clients have to say.

Email 4 - 12 weeks after set to stage
Meet our founder.

Mix in Channels

- **Email**
- **Phone**
- ****SMS****
- **Calendar Bookings**

PART 3

WHAT INVESTMENT SUPPORTS THE GOAL AND MARGIN?

- The marketing budget behind the leads

PART 3

Disclaimer - The results shared today are based on working with Intrigue. They do not represent the industry at large and are by no means a guarantee. Results vary business to business, and are dependent upon a decent sales process.

The marketing budget behind the leads

300 leads × $150 cost per lead = **$45,000 lead-generation budget**

ADDITIONAL BUDGET CONSIDERATIONS

- Website and conversion improvements
- CRM and tracking
- Creative and content
- Agency support
- Internal resources

The marketing budget behind the revenue

Revenue Goal 2027	Google Reviews	Scale	Scale Budget	Scale New Revenue
$2,000,000	Over 100	5.00%	$100,000	$1,000,000
$2,000,000	Under 20	3.00%	$60,000	$600,000
$5,000,000	**Over 100**	**4.00%**	**$200,000**	**$2,000,000**
$5,000,000	**Under 20**	**3.00%**	**$150,000**	**$1,500,000**
$8,000,000	Over 200	4.00%	$320,000	$3,200,000
$8,000,000	Under 100	3.00%	$240,000	$2,400,000
$10,000,000	**Over 200**	**3.50%**	**$350,000**	**$3,500,000**
$10,000,000	**Under 100**	**2.50%**	**$250,000**	**$2,500,000**
$20,000,000	Over 200	3.00%	$600,000	$6,000,000
$20,000,000	Under 100	2.00%	$400,000	$4,000,000

The marketing budget behind the revenue

Revenue Goal 2027	Google Reviews	Accelerate	Accelerate Budget	Accelerate New Revenue
$2,000,000	Over 100	4.00%	$80,000	$480,000
$2,000,000	Under 20	2.00%	$40,000	$240,000
$5,000,000	**Over 100**	**3.50%**	**$175,000**	**$1,050,000**
$5,000,000	**Under 20**	**2.00%**	**$100,000**	**$600,000**
$8,000,000	Over 200	3.00%	$240,000	$1,440,000
$8,000,000	Under 100	2.00%	$160,000	$960,000
$10,000,000	**Over 200**	**2.50%**	**$250,000**	**$1,500,000**
$10,000,000	**Under 100**	**1.75%**	**$175,000**	**$1,050,000**
$20,000,000	Over 200	2.00%	$400,000	$2,400,000
$20,000,000	Under 100	1.50%	$300,000	$1,800,000

The marketing budget behind the revenue

Revenue Goal 2027	Google Reviews	Grow	Grow Budget	Grow New Revenue
$2,000,000	Over 100	3.00%	$60,000	$240,000
$2,000,000	Under 20	1.50%	$30,000	$120,000
$5,000,000	**Over 100**	**3.00%**	**$150,000**	**$600,000**
$5,000,000	**Under 20**	**1.50%**	**$75,000**	**$300,000**
$8,000,000	Over 200	2.00%	$160,000	$640,000
$8,000,000	Under 100	1.50%	$120,000	$480,000
$10,000,000	**Over 200**	**1.75%**	**$175,000**	**$700,000**
$10,000,000	**Under 100**	**1.25%**	**$125,000**	**$500,000**
$20,000,000	Over 200	1.00%	$200,000	$800,000
$20,000,000	Under 100	1.00%	$200,000	$800,000

Can the plan produce the profit you want?

	Revenue
−	Direct delivery costs
−	Sales and marketing costs
−	Other overhead
=	**Operating profit**

Where the customers will come from

SOURCE	CUSTOMER TARGET	LEAD TARGET	BUDGET
Referrals			$
Partnerships			$
Organic search			$
Paid search			$
Social Media			$
Direct Mail			$

The calendar and capacity behind the plan

01 When must the work happen? → 02 When must customers sign? → 03 When must quotes go out? → 04 When must leads arrive? → 05 When must marketing preparation begin?

DELIVERY DATE — WORKING BACKWARD

06 **Can sales and operations handle the volume?**

The numbers that keep the plan honest

01
Lead source and service requested

02
Leads, quotes, and wins

03
Conversion rates

04
Customer acquisition cost

05
Revenue

06
Gross margin where available

Your 2027 plan on one page

Revenue target	$ _____
Target operating profit margin	_____ %
Contracted revenue for delivery in 2027	$ _____
Additional expected revenue from current/past customers	$ _____
Revenue required from new customers	$ _____
Average 2027 revenue per new customer, by service	$ _____

New customers required	_____
Quotes required	_____
Leads required, by source	_____
Total sales and marketing budget	$ _____
Required sales and delivery capacity	_____
First action, owner, and deadline	_____

“How much new business do you need, what will it take to win it, and can you deliver it at the margin you want?”

The Marketing Action Plan

Your Custom Growth Blueprint

Build the Plan: $2500

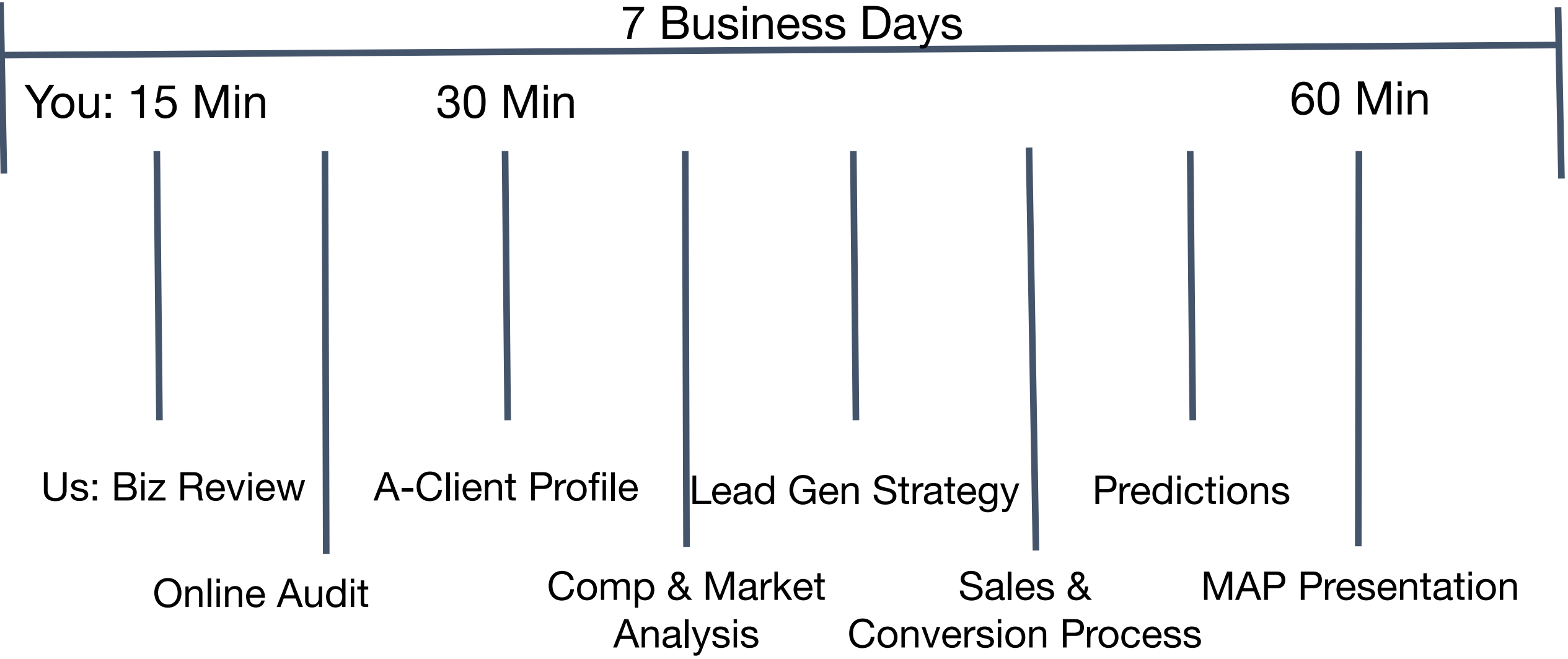
For you Today: $997
$97 To Reserve Your Spot



	Nov 2026 - Setup	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	Jun 2027	Jul 2027	Aug 2027	Sep 2027	Oct 2027	Total Investment
	$10,000.00	$697.00	$697.00	$697.00	$697.00	$697.00	$697.00	$697.00	$697.00	$697.00	$697.00	$697.00	**$17,667.00**
& Hosting		$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	$500.00	**$5,500.00**
tation			*	*	*								
cal Service Ads - Medium		$950.00	$950.00	$950.00	$950.00	$950.00	$950.00	$950.00	$950.00	$950.00	$950.00	$950.00	**$10,450.00**
unt (Client) +- 5%		$1,500.00	$2,500.00	$3,500.00	$6,000.00	$5,000.00	$5,000.00	$4,000.00	$4,000.00	$4,000.00	$4,500.00	$4,000.00	**$44,000.00**
> LSA Ad Spend Amount (Client) +- 5%		$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	**$11,000.00**
Meta Ads - Light		$750.00	$750.00	$750.00	$750.00	$750.00	$750.00	$750.00	$750.00	$750.00	$750.00	$750.00	**$8,250.00**
> Ad Spend Amount (Client) +- 5%		$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	**$16,500.00**
Own the Search 1 (Standard)	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	$1,500.00	**$18,000.00**
> Website Sprint		*											
> OTS Sprint			*										
> 1 Pillar Blog			*										
> 5 Supporting Blogs					*		*		*		*		
> 6 Backlinks			*	*	*	*	*						
> Google Business Profile Optimization	*												
> Citations Optimization (up to 100)	*												
> 1 Social Post/Month			*	*	*	*	*	*	*	*	*	*	
Reporting													
> Sales & Lead Tracking Tool (SALT) + Landscape Marketing Index (LMI)		$300.00	$300.00	$300.00	$300.00	$300.00	$300.00	$300.00	$300.00	$300.00	$300.00	$300.00	**$3,300.00**
> The Landscape CRM		$400.00	$400.00	$400.00	$400.00	$400.00	$400.00	$400.00	$400.00	$400.00	$400.00	$400.00	**$4,400.00**
Project Setup	$1,000.00												**$1,000.00**
TLCRM Set Up	$1,000.00												**$1,000.00**
Reporting Setup	$1,000.00												**$1,000.00**
Google Ads Setup - Medium	$2,000.00												**$2,000.00**
Meta Ads Setup - Light	$1,000.00												**$1,000.00**
Total Amount Paid To Intrigue	$17,500.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	$5,097.00	**$73,567.00**
Total Ad Spend Amount		$4,000.00	$5,000.00	$6,000.00	$8,500.00	$7,500.00	$7,500.00	$6,500.00	$6,500.00	$6,500.00	$7,000.00	$6,500.00	**$71,500.00**
Total Campaign Amount	$17,500.00	$9,097.00	$10,097.00	$11,097.00	$13,597.00	$12,597.00	$12,597.00	$11,597.00	$11,597.00	$11,597.00	$12,097.00	$11,597.00	**$145,067.00**

The Marketing Action Plan

Your Custom Growth Blueprint



The Marketing Action Plan

Your Custom Growth Blueprint

This Week Only – 5 Spots

MAP normally: ~~$2,500~~

For you today: $997

Lock in for $97

Valid until Tomorrow

Once spots are gone, they're gone!

Intrigue Media

5.0 ★★★★★ 201 Google reviews

Internet marketing service in Guelph, Ontario

Thank you 

See you tomorrow at **noon EDT** — same link. Missed one? Replays go out the next morning.

Vanessa McQuade

VP of Sales & Marketing and Co-Owner, Intrigue Media

→ vanessa@intrigueme.ca

→ intriguemedia.com

LIVE Q&A

Your questions

Drop them in the chat — I'll bring them to today's speaker.