

**The Scenario.** You are an account manager with Universus Media Group Inc., a creative and content agency in Toronto. Through a close relationship, Universus has been given the opportunity to present to Doug Flynn, the President of the Flynn Group of Companies. Universus has identified Flynn as a key client prospect for Universus due to a strong alignment between Flynn's content and training needs, and the skills and experience Universus brings to the table.

There are many ways in which Universus could potentially help Flynn, from e-learning courses, training, videos, to marketing and advertising. The key to this first meeting will be to choose the right area to focus on. Too broad a sales pitch won't likely resonate as Flynn will already have a number of providers for some of the services Universus provides. The key will be to focus most of the sales presentation on one or two areas where Universus can truly stand apart and capture the interest of Flynn's President.

Your goal is to build and deliver a sales presentation that will result in Flynn awarding an initial project to Universus, one that could well open the door to a much deeper ongoing client relationship.

**The Seller: Universus Media Group Inc.** Universus Media Group Inc. (<https://universusmedia.com/>) is a Markham-based communications agency and publisher. Launched in 2010, Universus has grown from a start-up with five employees to a mid-size agency with approximately 25 staff, and a network of more than fifty contractors and freelance creative staff.

To date, most of Universus' growth has come from organic growth within a few key clients. While Universus is still a relatively small company, they serve a number of blue chip, internationally recognized clients including Toyota Canada, Lexus Canada, Subaru Canada, Honda Canada, SiriusXM, Special Olympics Ontario and Fairstone Financial, among others.

In addition to their agency work, Universus publishes two B2B magazines in print and online: Canadian auto dealer (<https://canadianautodealer.ca/>) and a French-language sister magazine, Affaires automobiles (<https://affairesautomobiles.ca/>). These two magazines are the leading media for new car dealers in Canada.

Through their agency and publishing work, Universus has come to be recognized as one of Canada's leading experts in the automotive industry. This has been an important source of credibility and recognition for the company as it competes in one of Canada's largest industries. However, Universus wishes to diversify its client base and find growth opportunities beyond automotive. While Universus does have a few clients that are not related to the automotive industry, they are small and typically work with Universus on an occasional basis only.



As a marketing and communications agency, Universus has the skills and experience to produce almost any kind of content. Much of Universus' success has come from leveraging the combination of their creative and production skills and their industry knowledge to help clients with their training needs. For the automotive industry, the regular cadence of new, complex and high value products requires a constant stream of training materials for head office staff, field staff and dealership personnel. By focusing on this area, Universus has been able to grow significant client relationships without competing directly with those company's agency-of-records. For example, in Toyota's case, their agency-of-record is a global relationship that is chosen in Japan. It would be unrealistic for a small Canadian company to compete directly with that global agency, but that agency isn't focused on training materials or video production and this has created opportunities for Universus.

Once a working relationship has been established, Universus has often found they can expand beyond the initial engagement and start to win projects in other areas, such as marketing, website development and design. They do this with a focus on client service. As most projects require a number of interactions with clients, from initial project discovery through interim and final approvals, the opportunity to differentiate themselves through high service levels is one Universus has recognized and leveraged.

The account service team is one of Universus' primary strengths. The team often finds that once a relationship has been established, clients find ways to bring other types of projects to Universus simply because they really like working with the team. Internal referrals to other departments is a key growth focus for Universus, so identifying prospects that can provide both an initial opportunity and the chance to extend inside the client organization is key. The prospect in this case offers just such an opportunity.

**The Prospect: Flynn.** Flynn was founded in 1978 in Winnipeg, Manitoba. In their early years, Flynn's focus was on commercial roofing contracting. Flynn established a reputation across Canada as a top-notch commercial roofing contractor.

As architectural products became increasingly complex over the years, Flynn recognized a growing opportunity to serve clients by providing them with products and services for the entire building envelope. Flynn branched out to provide a range of architectural products and roofing services, including metal paneling, contract glazing and curtain wall.

Today, Flynn employs over 6,000 people and serves a diverse portfolio of clients across North America, for the entire building envelope.



Flynn places a tremendous emphasis on building their internal culture, known as “The Flynn Way.” Values such as safety, honesty, integrity, and doing what they say are deeply ingrained in Flynn’s culture. A key aspect of this culture is promoting from within. This helps ensure that the next generation of Flynn leaders are properly immersed in “The Flynn Way.” This emphasis on promotion from within makes training a key strategic pillar within Flynn, but delivering a great training experience across the range of products Flynn offers and national footprint that the company has is an ongoing challenge.

The nature of the products Flynn sells further focuses the need for great training materials, engaging training delivery, and accurate record-keeping on what level of training each Flynn employee has completed. Selling commercial roofing and building products and services means operating in businesses that can entail considerable risk if things aren’t done correctly.

Post-construction service is a huge part of Flynn’s business, reinforcing the need for top-notch training across all its branches. Business owners and management companies that look after multiple sites and struggle to get good quality service are the perfect opportunity for Flynn’s service business.

Flynn believes it has a strong approach to training material creation and delivery. The company has the ability to move people and management where they need to be, and maintains in-house training for best practices across all branches. At the same time, the company also recognizes that this area is changing. The remote communication needs created by the pandemic have produced a variety of new tools and methods for remote training delivery that Flynn is actively exploring. The potential of creating engaging new training experiences, and delivering them more cost-effectively than has been done in the past, is appealing to Flynn.

However, to date Flynn has handled all their training in-house. There may be resistance to the idea of working with an outsource partner. It may be seen as a cost increase and an unnecessary deviation from what has been working so far.

While there can be real advantages to outsourcing (access to different and in some cases more specific expertise, the ability to scale up or down quickly, and allowing the internal team to get more done without additional hiring, as examples) this may be a considerable hurdle that the sales presentation will need to address and properly support with facts and examples.



## Our strengths present a challenge

Universus' strength in automotive can present a challenge when selling to prospects in other industries. This may be a challenge in selling to Flynn.

The reason for the challenge is threefold:

- 1** Prospects want to be sure their agency partners understand the specific challenges and nuances of their own industry. Rather than see the common challenges that marketing, training and other types of communications present across all industries, prospects often focus on the differences between industries. This is a challenge for companies like Universus who must make the case that their experience and skills are as relevant to a company like Flynn as they are to Toyota and Honda;
- 2** In some instances, having customers who are global consumer brands rather than B2B brands can present a challenge. For a company like Flynn, who sells commercial products solely to B2B customers, they may well see Universus' portfolio of clients with consumer brands as not aligning with who they are. Universus needs to credibly demonstrate that the majority of the work they do for those consumer companies is in fact aimed at a B2B audience: the dealers and their personnel. In this way they are analogous to Flynn's training audiences.
- 3** Some B2B clients look at our portfolio of high profile automotive clients and assume we are expensive. While Universus' portfolio includes many projects that are reflective of higher budgets than most B2B companies usually spend, we are equally capable of leveraging modern tools to produce assets at very low cost. But that perception of being expensive is one we sometimes need to overcome, and it can often be a silent objection. Prospects often don't vocalize it.

**The risk of casting a net too wide** In almost every instance, an agency selling to a new prospect must overcome an incumbent provider that has an existing relationship and history with that client. The known and familiar are a powerful force against change, even in cases where the relationship isn't ideal.

At the same time, across the range of providers and agencies that a company as large as Flynn uses, there may well be areas where they aren't pleased with their current provider and are more open to change. This can make it tempting to try and sell a broader range of services. From website development to video to graphic design and more, Universus could present a wide range of services, and this might give us a chance to hit on an area where Flynn is looking for change.

Is presenting more than just Universus' expertise in training materials and delivery a better bet? Or does that create a risk of appearing as a "Jack of all trades, master of none"? That is a decision you have to make.



**To pilot, or not?** One tool that agencies often use to help open a door on a new relationship is a pilot project. By offering to complete an initial project at no or minimal cost, the agency creates a “product sampling” opportunity — a chance to shine and open the door for further work. Many prospects respond really well to this, as it removes the financial risk of trying a new vendor. They may see it as demonstrating an agency’s confidence in their work and their service levels, and their commitment to working with this new client.

Conversely, many don’t respond well to it. If they aren’t serious about considering a change, they don’t want to put their own time into working on a project with a new partner, as time is a cost in and of itself. And offering a pilot project can, in some people’s minds, be a sign of weakness. It can also create a risk for the agency. Some prospects may take advantage of the offer even if they have no intention of making a broader change.

**Does it make sense to offer a pilot project to Flynn? That is for you to consider.**

**Your Task** Universus’ connection can get a first meeting with Doug Flynn. We can be confident that we’ll get a fair initial hearing and a real shot at being considered. However, Doug will not sit for too long or sit through a long presentation, therefore hit the high mark’s quickly. As the saying goes, we only get one chance to make a first impression. Doug Flynn will need to see something in your presentation that warrants a deeper dive into how Universus might be uniquely suited to helping Flynn.

To help us prepare for the meeting, Flynn’s YouTube channel is full of exactly the kind of video assets that Universus excels at producing.

As you develop your sales presentation, your solution should consider the specific needs of the prospect and how to address those needs with a proposal. Your task is to address Flynn’s training needs in general and their alignment to Universus’ skills and capabilities, and persuade Flynn to start working with Universus by offering a specific proposal. Your proposal should show a path from initial project to deeper engagement so that Flynn understands the potential this relationship has to drive their training to a new level.

**Good luck selling!**

