



EP 11

**CLIENT SUCCESS INTERVIEW
WITH JOSH NELSON OF THE
SEVEN FIGURE AGENCY**





Azhar Siddiqui

Well, good morning everyone! Today my amazing guest is Mr. Josh Nelson of the Seven Figure Agency, an amazing coach. He's worked with us as well. He's working with several digital marketing agencies. And then also the plumbing and HVAC SEO. I think that came before the Seven Figure Agency, the plumbing and HVAC SEO business, which mainly focuses on plumbers and HVAC companies across the US. It's been an inc. 5000 fastest-growing company of the year for the last God knows, like what... four or five years straight in the road now. Right, Josh? And I think I think that's what intrigued me to come to talk to Josh, a while back that, you know...I read Josh's book, I went through all his podcasts and you know, what intrigued me was that it's not something you know, like...Josh didn't just become a coach. He did everything. And he continues to crush it on on the HVAC side of the agency that Josh is running, and brings all of those learnings and those amazing things that he's done over there and brings it to the coaching business. And it just shortens the growth curve for so many amazing agency owners. I've seen that in our business. And I know so many friends who are members with Josh who've had amazing, amazing successes in a really short period of time. So welcome to the show, Josh. I hope you're as excited as I am for this one today.

Josh Nelson

Oh, it's my pleasure, man pumped to be here excited about everything you've accomplished over the last couple of years and excited to share.

Azhar Siddiqui

That's awesome, Josh. So I kind of want to just quickly start out with -if you're comfortable sharing, maybe tell us about where you're at inside your agencies, or both in terms of revenue, or the number of the people and things like that on the HVAC SEO side and Seven Figure Agency side.

Josh Nelson

Absolutely. So like you said, I've got two businesses I've got plumbing and HVAC SEO, which is our digital marketing agency that serves the plumbing and HVAC contractors of the world. There we serve about 190 clients, we do about \$400,000 in monthly recurring revenue, and got a team of about 30 full-time employees, US-based and a number of VAs and third-party contractors that we work with on that business, which as you said make the made the Inc 5000 list of fastest-growing companies in the US the last four years in a row and it's continuing to grow. And then I run my passion project, Seven Figure Agency, which is my coaching business where I coach digital marketing agencies on how to grow and scale, build the seven figures, and beyond. There, we've got about 210 Members, we're on a mission to help 500 agencies go to seven figures over the next five years. And so I put a lot of my time, energy, and focus on that side. And of course, you know, the revenue there is growing and the team continues to expand as well.

Azhar Siddiqui 3:41

Nice. That's amazing, Josh, for some of the agency owners who might be listening to this, it may sound a little overwhelming, like all the things that you're doing right now, but maybe it will help if you can kind of share the backdrop of the story before you know HVAC - plumbing and HVAC SEO came to be what was the journey that led you to start that particular agency out?





Josh Nelson

Yeah, so my first digital marketing agency or web design company was a complete failure. I started that right out of college, you know, back in like 2004 and I was doing everything wrong, I had the wrong model. I was selling websites for a one-time fee, a low monthly you know, hosting fee and I was hustling I was working 40-60 hours a week but just couldn't make enough money to even pay myself. I would generate five or six grand I would spend way more than five or six grand and expenses and you know for literally three years straight just chasing my tail I had to shut that business down and go get a job and kind of learn how to sell and learn how business models work and learn what the right models were. I always had a passion for business and so I definitely knew I wanted to be an entrepreneur. I knew I wanted to be successful. And so you know I just went to study right I started reading all of the good books out there: Rich Dad Poor Dad, Secrets of the Millionaire Mind, The E Myth revisited, The Answer by John Assaraf, and on and on. And one of the books, T. Harv Eker from the Secrets of the Millionaire Mind says you know...to be successful, You have to build a business, right? One of the best ways to build a successful business would be to work somewhere where they're winning, where they're succeeding in a model that you're considering. And so on with that, I got a job at Reach Local, the big pay-per-click management company. I think they were doing \$250 million per year at the time. I was like, well, they are doing something right. Let me go figure out what they're doing there. And so I worked in the sales department at Reach Local, learned how to sell kind of learned more about the recurring revenue model. And from there, I said, Okay, I think I've got what I need to go start my, my next business. And that's what we started clicking incorporated, which became plumbing and HVAC SEO and, you know, has grown to over \$400,000 in monthly recurring revenue.

Azhar Siddiqui

Wow, that's an amazing journey. And I'm sure a lot of agency owners will be listening to us, I highly recommend that you get your hands on Josh's book, the Seven Figure Agency roadmap. And I still go back to that from time to time because it's not just written because you want to write a book, it genuinely helps out agency owners. And what just Josh just explained to us, you know, a few value bombs there. But, you know, I recently read this book by Kevin Hart, a famous comedian, and actor from Philadelphia. And one of his sayings is that you know, you guys may think that I just appeared out of the blue and got all of this amazing success. But my success is really an 11-year-old overnight success because people don't see what happened in the background, like from, you know...Josh, starting out your first web development business, you know...going back to school, to getting a job at Reach Local. Learning the sales skills and things like that, and then coming back to it again, strong. So you know, it's always- that really fascinates me. And your story is definitely one of those that motivated me, and I know 1000s of other people-it continues to motivate as well. So one thing I want to quickly - looks like you started the click, what was it called? Josh, the business right after-

Josh Nelson

Click Incorporated

Azhar Siddiqui

Click Incorporated, so how did it turn into Plumbing and HVAC SEO? And how did you kind of come up with the idea of identifying that niche?





Josh Nelson

Yeah, so like, after I worked at every store, I saw, like, a couple of things needed to be different, right? First of all, you didn't want to just sell a website, you wanted to sell, you know, a recurring program, where they're gonna pay you 1000 or more per month, which the numbers really start to add up when you're charging a monthly recurring fee. That's large enough to make sense. The other thing is, you know, you want to make sure that the service actually provides a tangible result, like where they're not just paying you for brochure, but they're paying you for, you know...something that's going to drive more leads, and more sales and more growth for their business. And so I learned kind of how to sell, I learned how to position monthly retainer services. And that's when I was like, Okay, I'm gonna start Click Inc. And we started as a local generalist, agency. And so we were selling to the local dentist, roofer, chiropractor, anybody we could get attention from. And I quickly started to notice that people gravitated towards people that already had some experience in their type of business. So when I met with the local dentist, he'd say, Okay, well, what other dentists did you work with? What results have you gotten for them? Can I talk to one of your dental clients? And I'm like, oh, gosh, I don't have that. So that would be a wasted opportunity. And so I started thinking, Well, man, if I can just like choose one vertical, one type of business, get great results in that it would be so much easier to get clients to position myself as an expert and to get really good at delivering results. And so we chose a couple of different verticals. We started maybe plumbing, we started maybe dentistry, we decided maybe I doctors, and before we knew it, we landed on plumbing. We had one plumbing client that we just did great work for, Town Plumbing in Fort Lauderdale, Florida. And he referred us to his buddy down in Miami southwest plumbing. And before we knew it, we had a number of plumbing clients that we were getting great results for, we had a proven model. And we said okay, let's just become the very best in that particular vertical. Let's stop trying to go after everything. Let's create a program, let's create branding, let's put out content and be the best known and really the best at delivering in that space. And that's how we rebranded as plumber SEO, which became plumbing and HVAC SEO, which is the business that we run today.

Azhar Siddiqui

Nice! So that's - you kind of had to figure that out on your own by trial and error, figuring things out on how things are working. But this is something that on the Seven Figure Agency side when you come into Josh's program as a member, this is one of the fundamental things that you know...you've learned from your current business. And you kind of give this out to your other agency owners who are coming in where identifying a niche is such an important part of becoming successful, and really, really rapidly. So, amazing, amazing value bomb there, Josh, thanks a lot for sharing that. So now I want to kind of switch gears and I want to kind of get into, like, you know, you shared your backdrop of how you came out. And, you know, you launched these agencies, and there's an amazing agency that you're doing great work with them the volume of the revenue you guys are doing, it's really, you know, amazing on the monthly side \$400,000 Plus, it's amazing. And some of us just dream of having that revenue on a monthly basis. So, my next questions are going to be geared towards seeing how you're marketing, your sales, and your client servicing is working on the backend. So let's start out with marketing and maybe just shed some light on, you know, what are the best practices for an agency owner who's wanting to run their marketing departments and start generating some leads? So these customers can come in, pre-positioned to buy from them, and they can kick start their sales process from there.





Josh Nelson

100% Yeah! So glad to talk about that. I really think when it comes to marketing and landing clients once you've got a niche, you can be very specific, right, you can really leverage a lot of different channels. I'm a big fan of cold outreach, getting a list, making introductions, just cold outreach, adding value, and kind of getting attention through brute force, but then also doing a combination of inbound marketing and position based marketing, which would be like joining the association, put on content for that association, do webinars, but do podcast interviews with successful people in the space and put out information and content, that industry like in us plumbing, that the plumbers and HVAC business owners of the world find value in and like, okay, that answers a question for me. Oh, I see. So that's how you're successful in this type of business. Oh, that's how we can generate better results, put out content that positions you as an authority that positions you as someone of value that has answers, and attract people into your world so that they can schedule in so that they can go through a sales process. And they can mutually decide whether or not it's a right fit to hire your agency services or not.

Azhar Siddiqui

That's awesome. And then Josh, also, if somebody is just starting out in their agency, or maybe they're stuck on that \$10,000 a month mark or something like that, what would be like one or two things that they can do right now, to start pulling in business in terms of marketing,

Josh Nelson

I would say you know, get a list. That's the first thing. And I really like two places to get a list of prospects in your vertical, either join the association, which in my mind is the shortcut path, right, because you know, anybody that's part of an association, in the industry is an active business, they care about education, and they care about growth, right, you're plugging into a community. And by doing that, you can gain access to the name, the owner, and affinity, so you can reach out to him, I'm contacting you, because you're part of this association, and I'm an industry associate partner, right. And then just get active in that association, start putting out content, start, you know, sharing case studies, sharing what you did, sharing the results that you've driven, be active, and then offer to help, you know, as you put out content, and you say, hey, you know, here's one client we work with in Fort Lauderdale that we got to the number one spot that's generating 222 new jobs per month, as a result of our services. That's how we did it, like show them the model and be like, Hey, by the way, if you'd like to get similar results, I'd love to sit down with you one week one to one and show you how we can help right and develop a funnel of sorts where they can see the value, they can get useful information. But then they can decide, well, you know what, that sounds good. I'd like to talk more about how you could do that for me. And so you know, if you're at \$10k, find the association, get the list, start putting content out to that list, start adding value, and become known to that world. And you will start to get at that and you will start to get people coming to you pre-positioned to buy.

Azhar Siddiqui

Yeah, and I have a testimony for that approach, especially on the webinars side. You know, we take a lot of stuff that you know, you teach and coach inside the Seven Figure Agency, and we implement it on a marketing site. And you know, we started our webinars maybe three months ago, you know, I think the first webinar we had nobody show up, you know, a few people coming in, but we just continued with that because that's what you coach and train that, you know, even though nobody's on the Webinars, you're still, you know, creating content, you have great value out of that.





And recently, you redid the entire webinar and that's the best part about Seven Figure Agency. Because you know, as you see success from running different funnels, you bring it over to your Seven Figure Agency, and you know, people can just use right away so, Mashood, our marketing director, he took the latest webinars snapshot that you had applied it to the webinar that we're going to be running next week, and we have a record-breaking people already signed up for it. And we still have one week to go for that. So amazing stuff. And just before we move on from the marketing question, Josh, how big is your marketing department? I'm not talking about the fulfillment that obviously you're doing for your clients and things like that. How big is the marketing department just for the plumbing and HVAC business or the Seven Figure Agency? Because I know that's important. We overlooked that lots of times because we're doing great for the clients. But for our own agencies, a lot of times we put that on the back burner. So how big is your marketing department?

Josh Nelson

So our market marketing department, I don't know, if you're considering sales as part of the marketing department or just the marketing department that's helping you put out content and carve up the content and-

Azhar Siddiqui

Yeah! That's the marketing department. Yeah

Josh Nelson

Okay. So I'd say that there's a team of three for each right there just dedicated to helping create the content, syndicate the content, promote the webinars, replay the webinars, and everything in between.

Azhar Siddiqui

Nice, nice, amazing. So so let's move on to the sales. And, you know, this is where, you know, I used to struggle with sales as well. So what Josh did, Josh went and got a job at Reach Local, learn the sales skills necessary. I'm an introvert by nature, I went ahead and got a job at BestBuy because I was very similar to you, I wanted to start a business but for the life of me, I couldn't sell anything to anyone and I have some crazy stories on that side. But you know, got to BestBuy, you know, and they have those crazy warranties that you're supposed to sell and stuff like that. So I got really, really good at it. I spent seven years there. And you know, by the time - but even before leaving, I had my agency started and I was selling and things like that. So, let's move on to your sales department. And let's talk about how that's set up. And how does it function for an agency owner that's listening to us right now?

Josh Nelson

I think your sales departments gonna grow over time, right. And you know, depending upon the stage, like you said, at \$10k, what you're going to do is different than when you're at \$30k, in monthly recurring or even \$80,000 in monthly recurring revenue. I think usually, as the entrepreneur you're pretty good at sales, right? Or you've learned to develop that skill in order to grow and land clients and get momentum. I think the first thing you probably need some help within your marketing and sales department is usually a marketing assistant and an appointment setter. So in a marketing assistant would be somebody that is helping to set up your promos, maybe the clean your list to get your emails out, to follow up on qualified or unqualified and kind of manage the day-to-day pushing up the buttons. And then you want an appointment setter, who's somebody that's proactively calling people on the phone, managing sell by chat, communicating with people as you want social media, and getting them to the place where they book in on your calendar.





Right now we've got appointment setters that are calling our prospects and calling the people we've got sell by chat dedicated people that that's what they do is chat to set up appointments. And then we've got salespeople that take the sales calls, take them through a consultative sales process, ask for the business and then get the monthly recurring fee.

Azhar Siddiqui

Nice, nice, and then obviously, you have that sales closer, where these appointments centers bring that all the qualified people over to, and I'll share my experience really quick how good of a process Josh has on the sales side is, but by the time I called, I had that first meeting with your sales head (Arnaldo), I think he's still crushing it for you. I pretty much had my credit card ready to go. And Arnaldo was like, you know, it'd be a shame. If, you know, you didn't sign up today. And you know, and that's kind of the advantage of having, you know, positioning yourself and I'm talking about the Seven Figure Agency right now where, you know, I went through the book, I went through the podcast, I went through all the material, I knew this was the right place for me. And by the time I had that first call with your sales head, you know, I was ready to sign up and that sales process like you know, if you follow the method that Josh teaches for an agency owner, the sales process becomes so simple and so easy, right? You're not doing any hard selling. You're just coaching and you know, it's not the right fit sometimes an agency like Josh's would let you know that, hey, maybe it's not the right time. But let's talk about this again and the next six months. So, I love the sales process you have in place. And we've learned so much. And that's kind of what we've got going on right now.

Josh Nelson

Yes, the kind of push versus pull, right, if you're just cold calling, and you haven't added any value you're pushing, and it's very high sales resistance, it's very hard, where if you pull you put out good content, you publish your book, you put out webinars and podcasts, people get to know like, trust you and be influenced by your value in advance. And then they schedule in and take them through an intelligent, thoughtful sales process. They're coming to you preposition to buy, and I'm gonna encourage all agencies really, that's where you want to get to as quickly as possible where you're not chasing people down, but they're coming to you because of your expert status because of your proven value. And you guys have just done such a great job taking that and implementing it in the VA world that you guys run it.

Azhar Siddiqui

Yeah, thanks, Josh. And, and that's such a huge value bomb for any agency owner, who's listening right now push versus pull, you know, you want to pull these people in. And, I'm by no means - I'm trying to say that, you know, I'm advertising for Josh here. It's just that we were implementing everything that Josh teaches us because He is our coach. And we just take those things. And you know, we've been in such a great position, Josh, where, you know, the sales department, to be honest, has been the last department that we're just setting up right now, we've had a one-person sales team for the last year. And we've had incredible growth with that, but had not even had that last month, like I was just telling you a few minutes back, we booked 60, introductory or discovery calls just from our marketing alone. And exactly, because, you know, we're following the pull strategy where we're putting out this content, we're showing these video ads, where we're pre-positioning these people training them and making them understand, by the time they come to us, it becomes such a simple sales process that we haven't really needed a salesperson right now, up until now, where you know, we're hoping for a big boom once we have a fully stocked up sales department.





So, moving on, to the last leg where, you know, you talked about the marketing for an agency owner, you talked about how your sales department is set up. Now what you really want to do as an agency or like you, you got like you're at \$30,000, \$40,000, \$50,000 in monthly revenue, you really want to be able to get the clients that you're getting in, you want to sustain or maintain these clients, you know, you don't want these clients jumping ship and leaving every month because then you're having to work extra hard. So, What's that process like on your side on account management, and I hope you're not taking all the calls and you know, anytime a customer calls, then hey, I got a problem with this SEO ad or something like that. What's the process like on that side on the account management side?

Josh Nelson

100%, I think this gets overlooked often. And you know, to really grow an agency, it's not just about landing the clients and delivering results, right, you have to deliver results. And you have to retain those clients. I think there are two positions you want to remove yourself, from a business perspective as quickly as possible, the operations, right building the websites, clicking the buttons managing the campaigns. And the second is, is the account management, right? Talking with the client explaining the results, going through the reports, seeing the vision for what's coming next. And so I was able to get myself first out of Operation, second out of account management. And I think usually somewhere around the 10 to 17 client range. Business owners, agency owners wind up capped, and they have to decide: Do I continue to try and do this myself and know that this is kind of as far as I can go because you can't manage the relationship effectively and sell and position and manage everything that needs to be done? Or do I hire an account manager to step in and take this on for me? And so at this point, we've got one account manager for about every 25 clients, and the way our world is structured, they get launched in a really, really world-class way, you know, welcome box in the mail, really clean thought out first, you know, two-week communication flow. And then they get, you know, placed into account management where our account managers are responsible for going to the reports every single month meeting with that client live and in person as often as possible on a monthly basis, sending a video recap and the times when that client is too busy. They just want don't want to meet and really just make sure that the client feels the love, understands the value that we're bringing to the table and sees: We're thinking about them and we're thinking about what we're going to do next to help them continue to grow and justify the expense that they're there making and the investment they're making in our services,

Azhar Siddiqui

So yeah, I totally agree with that. Having that account manager advantage is huge as owners of the businesses, you know, we take pride in everything that goes on. But we tend to wear different hats like we're one day we're doing marketing the other day, we're doing sales, the other day, we're trying to retain our clients. And you know, once you start growing, there's no way you're going to be able to do that. So as Josh mentioned, I think those are really good benchmarks where you know, 20 to 25 clients, or even before that, you know, you can foresee your growth, you should start pulling in an account manager, and I can promise that once that person comes in, you'll thank yourself, because now you know, you've kind of created a buffer between yourself and the customers. And this person's sole responsibility is to make sure that your clients stay happy all the time, their bonuses depend on that, their salaries depend on that, so, why not. So amazing, amazing shares. Josh, thank you so much for doing this. We're running to the end of our time slot here. Just the last question I want to ask you. You know, we've talked about the fundamentals.





And we've talked about how you set up things I want to talk to you about for that agency owner, who's listening to you, the 'why' behind why you wanted to, you know, build out multi-million dollar business for yourself or your family, like, is that even important for us to consider when we're going on these crazy journeys and building out these seven figure agencies and things like that? Maybe shed some light on that?

Josh Nelson

Yeah, I think that you know, the lie drives everything, right. I mean, if it's just to make more money, it's only going to take you so far. I mean, for me, I think it really comes down to money. Yeah, I want the money that I need to pay the bills to, you know, drive the car that I want to drive to do the things I want to do. But secondarily, and maybe probably more important as a driver is freedom, right? The reason most of us start businesses is so we can have the freedom to do what we want to do, to call the shots, to spend the time with the family, to take the travels, while still having enough money to live. I think the third in the hierarchy of reasons we do things is impact, right to feel like what we're doing in our life is helping others that it's impacting the people that we serve, it's impacting the people that we partner with, it's impacting, the team members that we employ, and the career tracks they go down. And for me, initially, it was just, I wanted enough money to be able to take care of my family and I wanted money too, you know, to live nicely. But it really evolved into I want to, I want to give my family the best but I also want the freedom and flexibility and the impact to know what I'm doing is really not just a cash grab, but it's helping the people that I serve.

Azhar Siddiqui

Yeah, yeah. And I think that's so important. Just because, you know, once you have that straightened out, everything starts falling into place, because again, like we're running around doing so many different things. But like, you know, when we have our core connected, and we know the reasons why we're doing all of these things, and just the impact not only on your family, I'm sure it's having, I know you have an amazing young family and growing family, it's amazing to be able to provide for them, but also the impact you're having on, you know, all the clients that you serve on both sides. And I can attest to the Seven Figure Agency side that, you know like we've been able to build out, we're going to be hitting 170 plus people probably ending the year at 180 people this year. And just imagine and it all stemmed out from you know, you and I, you doing coaching with me - for me, and helping me find out the right niche for myself. And now it's impacting 170 People just internally, and then, you know, 70 plus businesses that we're supporting right now. So impact goes way beyond but you know, having that figured out inside your head, I think it's such an important thing to have for any agency owner wanting to grow.

Josh, this has been amazing, phenomenal. I highly recommend anybody who's listening to and who hasn't heard about Josh Nelson, get your hands on Josh's book.

Is there. Is there a way somebody can - I know I got my book on Audible. Josh, I know your podcasts are on Apple podcast everywhere they can listen to but is there an easier way if somebody likes to read? I like to listen, but (if)other people like to read?

Josh Nelson

Yeah, I mean, you can find it on Audible. You can find it on Amazon. Or if you want to get a free copy. You can go to Seven Figure Agency. And there will ship out a free copy of the book. You just have to cover the shipping. So www.sevenfigureagency.com/book It's a great place to start.





Azhar Siddiqui

Awesome. Thanks so much, Josh. It's been a pleasure. Will talk to you soon, sir.

Josh Nelson

Excellent. Thank you so much, and congratulations on your growth, and thanks for the amazing service, you guys. provide I mean, to us as a business, you've really helped us grow our sales department, our marketing department, keep the consistency in that side of things. And, and the members that you serve are growing and it's helping. It's helping Seven Figure Agency generate the results that we want because everybody needs an extra pair of hands. And you guys just have really, really good people that are trained, that understand the process. They're doing great work.

Azhar Siddiqui

Appreciate it, Josh. Thanks very much. Thanks, everyone for joining. You can listen to this on our podcast available on apple([apple podcast](#)), android, and anywhere else ([Youtube](#), Spotify, Overcast, Amazon Music, Stitcher, and many others)

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