

# Small But Mighty Agency Podcast

## Episode 59: CXD Studio: How they turn clients into preferred partners and create a sustainable business

### Speakers: Audrey Joy Kwan, Katherine Boyarsky, Gabby Pinto

#### Audrey Joy Kwan

Do your clients see you as a partner or a vendor? What is the difference? And why does it matter? My guests today prioritize setting themselves up as a partner to their agency clients, and establishing a strategic relationship that is long term which helped them reach their first \$500,000. When your clients see you and your business as partners, you can create a more profitable and sustainable business. So what is the difference between a vendor and a partner? A vendor relationship is transactional, you contact each other when a transaction is needed. In a partner relationship, you have a deeper connection, including insights on working styles, and communication, leading to more trust and long term clients. Hear how this duo prioritizes building partnerships with their clients and why they kept their full time job until the agency hit \$500,000 in annual revenue, tune in.

#### Audrey Joy Kwan

Welcome to the Small But Mighty Agency Podcast. If you're a creative consultant, or agency owner, who wants to know what the roller coaster ride really looks like to grow your business from one to many, you're in the right place. My guests met pull back the curtains on the realities of growing and running agencies of different sizes, and what it takes to build a team. And if you're anything like me, you want more than the highlight reel. You want to learn from the mistakes of others so that you can stop short of making the same mistakes on your host, Audrey Joy Kwan. I spend my days as a coach and consultant to multiple six and seven figure agency owners. For the last seven years, I've been behind the scenes, helping people grow, lead and operate small but mighty agencies. Here at the Small But Mighty Agency Podcast we'll uncover what works and equally as important what didn't work to get these business owners to where they are today.

#### Audrey Joy Kwan

Hi, friends. Welcome back to the Small But Mighty Agency Podcast. We have a dynamic duo today, Katherine and Gabby grew their service based business to half a million dollars before quitting their full time jobs. We're exploring why 500k was their magic number and how they grew and continue to grow

their business. Specifically, we'll dive into how they strategically focus on being preferred partners with enterprise businesses. Before we get into all goods, Katherine and Gabby tell us a little more about you.

### **Katherine Boyarsky**

Hi, I'm Katherine Boyarsky. I am the Chief Marketing Officer and one of the cofounders of CXD Studio along with Gabby, I am a, my background is in content marketing content strategy and some journalism way back when. I am our Head of Content Strategy and copywriting and that those are my specialties. So yeah, that's kind of me.

### **Gabby Pinto**

Hello. I'm Gabby Pinto. I'm the Chief Creative Officer here at CXD Studio. And my background is in marketing and design, as well as some web design animation as well.

### **Audrey Joy Kwan**

Tell me more about your partnership. How did you meet each other and start the agency?

### **Katherine Boyarsky**

Yeah. So actually, when we were in our first jobs together, when Gabby was interning and I was working in marketing for this small email software company, we had even talked about starting a company from the very beginning together, our skills just complemented each other so well. We were like, we were going to name it Pixley media at the time. This was many, many years ago. And so we just we really had a really great creative chemistry. And we worked really well together on projects. And we always were thinking of new ideas. But my dream job at the time was to go to HubSpot. And that's where I went from this first company. And I went to work at HubSpot. And Gabby and I both kind of ended up going to a few different companies over the years working in tech SaaS. And so then basically, we we were both freelancing on the side of our full time roles. And at a certain point, we were kind of passing clients back and forth. If somebody came to me and was looking for design services, or if they came to Gabby and were looking for copywriting, we would work together on projects and refer each other clients. So we decided to partner up in 2017, and actually start our business, create an LLC, and start basically a side business of our content marketing agency.

### **Gabby Pinto**

Yeah, and I think what Katherine also didn't mention is that we ended up living together and being roommates. So it made things a lot easier to start a business. And we were both just like really like driven and just wanted to exceed in our careers as much as possible and really liked what we were doing. So I think that was a big push in, in starting a business together.

**Audrey Joy Kwan**

Let's discuss when you decide to go all in on your agency. I was surprised how both of you manage full time jobs or running a half million dollar agency. That's a lot of juggling. Why was that dollar amount the signal?

**Gabby Pinto**

Yeah, I think from my perspective, you can speak to your perspective with nursing but from my perspective, I was really just growing within the tech companies that I was working at, and just learning a lot from the teams that I was working with. And I was a little afraid to just go on my own, because I knew there was so much more to learn from these experienced, you know, creative leaders that I worked with at companies like toasts, and athenahealth, and Amazon. So my last job before I went full time was at Amazon. And I think I just really loved working there and was learning so much that I didn't want to give that up completely, and was, you know, working two full time jobs and enjoying both of them, too. So it ended up being just that at some point, I said, okay, like, we've made a lot of money, and the business continues to grow. So we are going to, you know, if I don't go full time, there's a cap, you know, of how much work that I can do in a certain day. And, you know, so that's kind of what led to leaving is just like, you know, bittersweet to leave a really smart team. But also knowing that Katherine and I had so much ahead of us and so much opportunity was coming our way that this is a once in a lifetime thing to grow your business.

**Audrey Joy Kwan**

Katherine, how about you? How did you manage a full time job plus run a \$500,000 agency, many people would have quit their full time job when their business hit six figures, nevermind, half a million dollars.

**Katherine Boyarsky**

Yeah. So, I had a very different path from Gabby. I was working at I was working in tech. And I decided actually, in 2017, I went complete 180, and I went to nursing school. So I was doing our business as a side job during nursing school. And then I started working full time as a nurse here in Boston. And I was a nurse through the pandemic. And our business continued to grow throughout the time that I was working full time as a nurse. So I got to a point where I was also kind of in a similar situation, I really loved my job as a nurse, and I really loved working on our business, but I was kind of working all the time, nights, weekends. And I, you know, it's just something that when you look back at it, it's that kind of momentum, you just, it was really hard to turn that away and to try to to, you know, not take advantage of that momentum that we had with our business growth. So I decided to go full time with our business. And I stayed per diem as a nurse. So kind of got the best of both worlds. And I still work a few days a month at my old hospital. So it was but it was crazy, though, it was absolutely absolutely

wild, when we were kind of growing so much. And, you know, requests were coming in. And we it's just something that you hope for, and it happened for us, which was really exciting.

### **Audrey Joy Kwan**

I imagine that could not have been easy. Describe for me how you managed that lifestyle.

### **Katherine Boyarsky**

I was, I took meetings from the hospital, my boss was fully on board for me doing my business as well as working there. And I would I would take business calls from work on breaks. And I would check my email during my lunch break and respond to clients. And we worked a lot of nights and a lot of weekends. To be honest. I know it's not exactly the healthiest recommendation. But

### **Gabby Pinto**

Yeah, I think I think at some point, too, we started hiring freelancers to help us so there was a point where it was impossible for us to do it all while having the job. So we we looked for freelancers that were talented and could take on work and train them. So yeah, a lot of nights and weekends and, and then starting to put processes together to make our lives easier, like eventually hiring a project manager, and then just building a community of freelancers that we could reach out to whenever something happened, or a new project happened that we couldn't take on ourselves.

### **Audrey Joy Kwan**

You were at the point where you needed to hire a team to get client delivery off your plate. I'm sure that was happening before 500k. Why wait till 500k to give your notices?

### **Gabby Pinto**

I don't even think we even thought that, you know, we would get to this size. Like we both started as just like this is you know, a fun side hustle to you know, you know, grow our skills. And it's also just like a nice thing to design for other clients than just like working at your tech company and just doing focusing on that industry. So we were able to like learn about new industries and you know, creating for me it was just like creating new types of projects that I hadn't done before. But yeah, I think yeah, we never imagined it would be this big. And I think it just grew really quickly in the pandemic as well. We have a really like, insane two years like 2020 to 22 and then eventually, what do you think of was like the point?

### **Katherine Boyarsky**

I think it was partly just that the girls got to a point point where it was either go full time or stop. And then I also think that it was to a point where both of us felt really confident that this was sustainable for our full time jobs and to completely sustain our lives. I think that was something we were both we were actually both looking at, we wanted to buy houses. So I was worried that if I didn't, if I didn't have a full time job, it was gonna be really hard for me to buy a house, Gabby wanted to buy a house. So there were kind of other things in our lives that we were really wanted to be really, really certain that this was going to continue because you know, as a freelancer or as an agency, your months fluctuate, so it can be hard to feel really confident at that point, like, okay, even though things have fluctuated, I know that year over year, this is sustainable, no matter you know, if we have a slower quarter and a more busy quarter.

### **Gabby Pinto**

We were extra cautious.

### **Katherine Boyarsky**

Yeah.

### **Audrey Joy Kwan**

Thanks for detailing that. I want to dive into how you grew the agency quickly. You mentioned that you had a tremendous two years of growth, and there was a hunger for your services in your niche. Tell us about your niche and how you found it.

### **Katherine Boyarsky**

We specifically work with b2b SaaS brands. And we do content marketing for them. But more specifically, we work typically with enterprise level b2b SaaS brands, so business to business software as a service. So mostly software companies, tech companies, we have dabbled in FinTech. But it's usually more of you know, these kind of marketing, software platforms, and adjacent, you know, software platforms that support business growth also. And something that we were able to take from our roles in b2b SaaS was, how do these companies work, which teams use content marketing within those businesses, so we're able to kind of expand our services from just working with the main marketing team to being able to work with the product marketing team, or the sales enablement team. So being, having been at large tech companies in the past, on the marketing team, we definitely were able to, that helped us a lot in creating our, in going into that specialty. And that specialty, is now, feels like it's blown up so much since then, because we started working in these companies, you know, eight years ago.

### **Audrey Joy Kwan**

Your proximity to SaaS companies before starting your agency was an advantage. It shortened the learning curve on two things. First, how to get in the door with enterprise companies. And second, how to excel at establishing your business as a preferred partner with these companies. I want to explore what you are doing to set up as preferred partners.

### **Katherine Boyarsky**

Yeah, so one thing that we've been able to do with a few of our clients has been kind of one thing is anticipating their needs, educating yourself on what their goals are, and what report what they're reporting to their team director, and how you can help them kind of hit their goals and succeed. Because when they hit their goals, then other teams want to learn from what they're doing, and they want to work with you, too. So something, here's a story about a time that we were able to kind of anticipate needs, educate ourselves and suggest a solution and then be able to grow within a company is that a lot of our clients went through the same growth phase where they started to want to localize their content as they expanded their businesses internationally. And some of our clients started coming back to us and saying, Do you have these original files from projects that you worked on us with our US team? And we'd say, Yes, we have these files, and we'd love to help you localize them for a new team. Once we were able to localize that content, then the team that we worked with on the regional team side, wanted to start working with us and started coming to us and needs a new content strategy. They need advice, they need, because they're starting a whole new content marketing channel in a new region. And they have budget, but they just don't have resources, because they're usually small teams. So that was a time where we were able to say, here's something that we're experienced in which is localizing content. And here's how we can actually suggest the strategy to do this at scale.

### **Audrey Joy Kwan**

Success with the first team is key. It provides a concrete case study showing that your agency works well with their company, plus it means you've established a process working with one team, demonstrating that your learning curve with other teams will be shorter.

### **Katherine Boyarsky**

Exactly. So we always start our process with a new client by going through kind of an audit of their content, marketing, presence, strategy, what do they have available to them, and then we make recommendations. So we can apply that to another team, another market, another region, another product, and it's a scalable way to grow our business and help grow their business.

### **Audrey Joy Kwan**

Getting in front of other teams in the organization and generating more visibility for your work is strategically essential to growing your business. What do you do to make that happened?

### **Katherine Boyarsky**

A lot of the time it's through word of mouth, somebody will recommend us to another team. But there have been times in the past where we've had a lot of outreach from people that we've worked with in the past who have changed teams. So somebody that you work with now moved to a different team, they know how talented you are, they bring you over any other ways?

### **Gabby Pinto**

Yeah, I'd say like, someone gets promoted and moves to a different team, just in terms of like, understanding, like, if we have, you know, a client from one specific company, and even moving companies that's happened before where like, someone gets a new job, and comes in reaches out to us, tells their team about our agency, and what we can provide, the value we can provide. So a lot of times as word of mouth, and they kind of sell us to their co workers.

### **Audrey Joy Kwan**

If you create a complex business that makes you feel trapped, you will never want to grow your business, you'll do little or big things to self sabotage growth, because nobody wants to scale overwhelm, not you, not me, I've been there. I learned this lesson as a second in command of an agency, I could not turn off my brain and relax because I would worry about what was and wasn't being done. It wasn't until I looked at the business reprioritize service perspective, it gave us more bandwidth to double the revenue and sell it and exit the business. Since then, I've been behind the scenes, multiple six and seven figure service based businesses, helping consultants and marketers who are at capacity, get out of being stuck in service delivery and growing. It all starts by looking through the lens of a productize service. download the free Productize Your Service Roadmap, go to [audreyjoykwan.com/roadmap](https://audreyjoykwan.com/roadmap) or, click the link directly in your show notes.

### **Audrey Joy Kwan**

How you think about growing your business is timesaving and highly strategic, you're growing deep roots in the company, but servicing as many internal teams as possible. Of course, you're going out there and getting new clients. But one of the highest priorities in your business is maximizing the opportunities available to you with your current clients.

### **Katherine Boyarsky**

It kind of happened sort of organically from the start, but we would start getting requests from, you know, like I said before, the product team or the sales enablement team, and a lot of the times we're really ingrained in these companies, we're in the Slack channel, we are in some team meetings. So we people are aware of who we are and what we offer. And then we're able to you know, capitalize on that

by being and we're already in their system. So it's a lot easier for them to work with us if they know that they're their co workers have trusted us in the past. And we already know the brand. And we're already in the systems as event vendor. So

### **Audrey Joy Kwan**

I want to zone in on something you just said it's the word visibility, what are some of the things you're doing to create more opportunities for your agency to be visible in the companies you work with?

### **Gabby Pinto**

Yeah, I think we are like in some Slack channels, and some like project management tools. But we're also providing really valuable ideas and every meeting that we that we have with them that kind of exceed that project. So just like future project ideas, or things that are connecting to that project that we're doing, that could be something they can explore in the future. And they're always, like, they have a budget, and they're always thinking of like what to do next. And then I think that kind of, you know, they can remember some of the ideas that we provided, and reach back out to us for that. Yeah, what do you think?

### **Katherine Boyarsky**

I was gonna say ideas. Ideas, I think are something that really help us stand out and bring value to them. And we've had a lot of conversations recently where people have, you know, people in marketing roles have problems being creative and coming up with new ideas, they have goals to hit, but they just, it's hard when you're trying to manage a program or a team or, you know, to sit down and just think of ideas. So that's something that I actually did on a call recently, one of our clients is going out on maternity leave. And she was like, I just can't think I need to sit, I need to fill out this whole content, strategy and calendar for the next few quarters. And I just can't think so we just started brainstorming, and I gave a ton of ideas. And she's like, Oh my God, I didn't think I was gonna get this done before I went out on leave, and now it's done. So that's a way to help the client and then also get work back to us.

### **Gabby Pinto**

I was gonna mention something too, there are times where like, we have a client that you know, wanted to we created a report for them and they in promotional assets and we provide some ideas on like, should we try to do an animated version of this or should we try to create like a different type of content like, more shareable, so just providing those topics and then we were seeing them like on social media, we kind of you know, are ingrained in that so we know you know, what we've seen what's popular, what's trending, so getting those ideas out to them and that is also a sort of like an upsell move from our side on just like here's, you know, more services that we can provide to you.



**Audrey Joy Kwan**

I love that you brought up the word upsell. What does an upsell look like in your business?

**Katherine Boyarsky**

We're project based, so we upsell on projects. So when we work with clients regularly, we are able to kind of understand what a campaign looks like for them. And sometimes they might come to us for one element of a campaign like, you know, a digital guide, and then another time, they might just need the promo assets. And that flexibility is something that I think our clients really appreciate is being able to use our services when they need us and not use them when they don't need us or don't have budget. And then they come back to us because we're easy to work with. But we always share a lot of our services, we share a pitch deck with all of our services upfront, so they're aware of everything that we do. And then like Gabby said, we're able to suggest add ons to a campaign. Let's help them make a landing page, or let's help do an ad campaign and maximize the life of this campaign. And then we like to bring up those conversations too. If there's, you know, coming to the end of a quarter, do you have any extra budget leftover that you'd like to do an ad campaign, let us help you put together that, you know, that creative and something to test. And that's just something that our clients like to take advantage of.

**Gabby Pinto**

We worked with a client recently that had just like their landing page that they launched for, like an industry report that they launched the year prior was, we noticed a lot of opportunity to update that landing page seemed like just from our experience, we kind of can guide them on CTAs to add and just certain techniques that they can optimize that landing page. So that report that they launched the year prior we were they asked us to create a new report for this year. So that was a way for us to upsell on, you know, let's help you create a landing page that's more optimized. And let's help you create social, promotional assets to take leads to that landing page. So things like that just seeing opportunities within their existing content as well.

**Audrey Joy Kwan**

The retainer type model is seen as the gold standard in an agency because it creates more predictable income. I think that reoccurring projects can be just as sustainable in a business, especially when your ideal clients needs reoccurring projects across the entire business. Tell me your thoughts on the retainer versus the project model.

**Katherine Boyarsky**

We have experimented over the years with a retainer model. And we found that it puts a lot of pressure on the client to require the same needs month over month or quarter over quarter. And so once they start to get kind of oh, actually this quarter, we might not need that, or this, you know, it just ended up being easier to do project based. And overall, our clients have definitely expressed that they liked the flexibility of being able to come to us and book us for 20 projects at once or because for one project at once just depending on their needs at that time.

### **Audrey Joy Kwan**

The reoccurring project model works well when your goal is to be a preferred partner, because you're not looking at one off projects, you're still looking at a series of projects booked throughout the year with multiple teams across the enterprise. You also mentioned in a chat we had offline that a distinct advantage of working with teams across the enterprise is the opportunity to get deeply educated in how their business works tell us more.

### **Katherine Boyarsky**

What we have done is not only, well, we do have experience in these industries, and at companies that have already scaled and are very successful. But we're able to take a lot of learnings from our own experience, our clients testing and optimization methods that we can bring to other clients. But what we do is with every new team that we work with, we're always asking about goals, how things work, how do you get your leads? Where does that come from? Who does it go to? So that we can understand our piece in the puzzle, and then help them improve all of their numbers, and suggest where they might be able to support another team. actually Maybe the reason that this isn't working is actually because of the data quality that's coming in. So really understanding what their goals are for each team that we're working with. And the greater obviously business initiatives, but we just we really do try to educate ourselves for each individual client and on the industry. We're constantly reading articles, we go to events, we, you know, we attend our clients events. So we're always just trying to know what product launches are coming up and understand the larger business picture for in the context of each project so that we're able to add value. Oh, you have an event coming up next month for this product product? Have you optimized the landing page for that product since then? Oh, no, we didn't even think about that. We should definitely do that before that. And so anticipating their needs based on their business goals.

### **Audrey Joy Kwan**

As we wrap up here is there anything else you want to share this helped your agency be preferred partners to organizations?

### **Katherine Boyarsky**

We both do a lot of and we also you know, part of one of the things that I do a lot for my day to day role is actually interview leaders in the space. So I kind of get a firsthand look at what's coming what people are focusing on and what companies should be thinking about. So for example, this year something that a lot of companies are thinking about is revenue optimization and how every campaign can be tied to ROI and make sure that everything they're doing is really geared towards the bottom line. So that's something that we can bring up with our clients and say, how are you approaching your, you know, marketing ROI for this quarter? How are you approaching revenue optimization? What how does each different, you know, channel that you are putting your money into and your efforts into how is that giving you returns. So being, you know, being able to provide that for our clients and kind of give that high level strategy is definitely something that we get to take from different parts of our day to day client work and apply to other areas.

### **Gabby Pinto**

One thing to add to that, too, is we a lot of times, we offer some suggestions to clients from based on what we've done with other clients. So we'll say like, oh, like this client here, you know, we just did this with them. And it worked really well. And we think that this is a good idea for this project for you. So a lot of the times connecting all of our clients and all of the work we've done throughout to provide more value there.

### **Audrey Joy Kwan**

Thank you for highlighting those two points. When you go deep into niche, it gives you the advantage of expert knowledge, whether it's identifying industry changes that will impact the future of the work you do with your clients, or looking at what has worked in the present and applying it elsewhere in your clients business. So as we close here, tell me what motivates and inspires you?

### **Katherine Boyarsky**

Great question. We love creative, being creative. And that's kind of what is our you know, it's our most fun thing. So we love working on our own brand a lot. And that's something that really motivates us to you know, keep growing and supporting other women who are creative and freelancers and trying to get their start. And that's been something that has been one of my favorite things while we've grown our business is kind of being part of the women supporting women in creative professional roles world.

### **Gabby Pinto**

Yeah, we recently launched a shop for brands called just the CXD studio shop, you can go and CXD.studio/shop to see it. It's has a lot of creative and we're gonna try to do more. We're doing like apparel just merch style, we're doing we're designing cups and mugs and I think just like having that outlet to...it's not SaaS, b2b. It's really just like fun, creative personal projects that we put out in the world also is something that like kind of excites us and keeps us ready to create and do more.

**Audrey Joy Kwan**

Thank you both so much. Where can people find you online?

**Katherine Boyarsky**

We are at CXD studio. And we are at [www.CXD.studio](http://www.CXD.studio). And on social yeah, we're at CXD studio. I'm at Kat Boyarsky

**Gabby Pinto**

and I'm at Gabriella Pinto, LinkedIn,

**Katherine Boyarsky**

LinkedIn. Yes,

**Audrey Joy Kwan**

Thank you guys.

**Katherine Boyarsky**

Thank you so much for having us. This is great.

**Audrey Joy Kwan**

Hey there. Thanks for hanging out with me at the Small But Mighty Agency Podcast. If you enjoyed this episode, it would mean the world to me if you hit the follow or subscribe button in your podcast app and share it with a friend. I'll see you in the next one.