



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

## CTRL+CLICK CAST #101 - Strategic Partnerships & Cold Outreach with Jake Jorgovan

*CTRL+CLICK CAST is proud to provide transcripts for our audience members who prefer text-based content. However, our episodes are designed for an audio experience, which includes emotion and emphasis that don't always translate to our transcripts. Additionally, our transcripts are generated by human transcribers and may contain errors. If you require clarification, please [listen to the audio](#).*

**Preview:** One thing I want to kind of add on there is that one of biggest mistakes I see people make with any form of cold outreach or a lot of times really any sort of email or just digital communication with customers that they try to make the sale in the email, and I always try to tell people like, “No, that the goal is a phone call.” Like that’s you’re trying to get to a phone call, start a relationship, and then once you have that, then you make the sale, and I see a lot of people, whether that’s an inbound lead or they’re doing outbound cold emailing or even when they respond to someone who’s like in the cold email and says like, “Oh, hey, can you tell me a bit more about yourself,” and they go into a full sales pitch. You just want to pique interest and get to the call, like that’s the goal, that is step one.

[Music]

**Lea Alcantara:** From [Bright Umbrella](#), this is CTRL+CLICK CAST! We inspect the web for you! Today we have Jake Jorgovan on the show to talk about strategic partnerships and cold outreach. I’m your host, Lea Alcantara, and I’m joined by my fab co-host:

**Emily Lewis:** Emily Lewis!



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** Today's episode is sponsored by [Foster Made](https://fostermade.co), a versatile web development agency specializing in custom application development, content management systems and user experience design. Through partnerships with designers, agencies and organizations, Foster Made is committed to building better digital experiences. Visit [fostermade.co](https://fostermade.co) to learn more.

This episode is also sponsored by [Arcustech](https://arcustech.com), who hosts this very show! Have their expert technical team manage your servers so you can focus on working on your client sites. They also happen to be an official Craft CMS hosting partner with various plans optimized for that, and they just expanded their servers to the EU. Sound good? Take 15% off the first three months of your single or multi-server monthly plan with the discount code CTRLCLICK101. We will spell it out in the show notes. It's valid until the next episode airs so sign up today.

[Music ends]

**Emily Lewis:** So we talked about the basics of marketing your freelance business or creative agency on this podcast and today we're taking the topic into intermediate territory. We'll be exploring a few marketing tactics Lea and I have actually tried with Bright Umbrella with varying degrees of success, primarily strategic partnerships and cold outreach, and to guide us on this journey is our friend, Jake Jorgovan. Jake helps agencies and consultants win their dream clients. He runs an outbound marketing company, LinkedIn lead generation company, and blogs regularly at [jake-jorgovan.com](https://jake-jorgovan.com).

Welcome to the show, Jake!

**Jake Jorgovan:** Thanks for having me on here.

**Lea Alcantara:** Absolutely. Can you tell our listeners a bit more about yourself?



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** Yes. So my whole background was that I actually used to run an agency. We were a video production agency and we did animation and design and graphics for stage productions at live events, and when I had this agency, I had a business partner. We were 50/50 partners in the business, and he was incredibly talented at the technical side of things, really good at all the creative and just actually delivering on all the projects, and my whole strength was in the sales and marketing side of things.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** So I did a bunch of work in terms of getting us new clients and I got us clients like Telemundo and Hyundai and Fidelity Investments and Wal-Mart and all these really big customers, and so basically after leaving that agency and eventually splitting up that partnership, we basically started going out and for the past several years I've been consulting and helping other agencies and consultants get more clients. So that's kind of have been the whole focus of my career for the past few years and even recently I launched a new LinkedIn prospecting company, which is more of the done-for-you product type service called Lead Cookie, and that's been another business I've spun up on the side as well, that's kind of operates without me and everything as well, but that's another business that I'm running as well.

**Emily Lewis:** Cool. So a little background for our listeners, actually Lea and I met Jake this past spring, late spring, at the HOW Design Live Conference. For our regular listeners, you may remember we had Ilise Benun on the show at the end of last year to talk about marketing, and she had a full-day workshop at HOW Design Live, all about helping creatives better market themselves, get better clients, and Jake, you did a presentation sort of talking about some of the things that you helped other agencies do to win these types of clients, and it was so practical.

**Lea Alcantara:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** Just like Ilise's advice was on our show last year that we just absolutely had to have you on and sort of talk about some of these – I guess I'm calling what we talked about with Ilise, our Marketing 101 episode, and this is like our marketing 201 episode. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** Because I feel like some of the things we're going to talk about today are things that Lea and I started incorporating after we did some of the things Ilise had suggested to us as more basic stuff.

**Lea Alcantara:** Right.

**Emily Lewis:** So just a little background for our listeners that we've seen firsthand how practical and useful Jake's advice is, so thanks for joining us today. Let's start with talking about strategic partnerships. Can you explain what that is in the context of creative freelancer or agency?

**Jake Jorgovan:** Yes, so strategic partnership is probably one of the most common ways that I see most agencies or consulting companies or even freelancers grow, and a lot of people don't necessarily think of this at first. It could just be a lot of times this is how people get started. They have maybe one or two people who just happen to refer a lot of work to them or maybe they are working with a larger agency who gives them a lot of business or like there are a lot of different forms that strategic partnerships can take, but it's one of the most common ways that I'll typically see people getting a steady flow of work and it's a great thing because if you set up one or two or three really good partnerships for your business, it can lead to a lot of ongoing work, a lot of repeat business.

A lot of times these happen organically, but I'll just give some kind of I guess examples of what those partnerships can look like. So one client I worked with, which probably I'll dive deeper into his story a



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

bit later, but it's Nate Freedman of Sherpa53, and he does Pardot consulting, and so Pardot is kind of the Marketo or the Hubspot that is built by Salesforce.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** And so him, he partnered up with some actual Salesforce implementation consultants and he basically becomes like the back-end. They do the Salesforce implementation and then they refer him Pardot work. So like that's an example of a great strategic partnership where those people are consistently able to send him business. For my own business, I do a lot of work helping a lot of agencies and consultants figure out how to generate more leads, how to win new clients, but for that to really work, I need people that are actually positioned well. So for example, Philip Morgan is someone in the space who talks a lot about positioning and Philip has sent me tons of business and clients because after someone goes through his program, they get their positioning dialed in, it becomes a natural evolution of, "Okay, positioning we dialed in. Now we need to ramp leads, let's talk to Jake." So like that's another example of a good partnership there.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** Another that I spoke at it at HOW was there's a guy Vinnie who basically went to a really large agency so he's a small UX agency. I think they were maybe three or four people when he started up this partnership, but he basically had this guy who just had hunted him down at a conference. He met the guy who runs this agency that has hundreds of millions of dollars in revenue and he basically got them to give him all of the work that was under \$50,000.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** And he gives him a referral commission back for that, but for his 3-person agency getting all these 50,000- or 30,000- or 20,000-dollar projects on a regular basis, which is huge for him and he's getting these massive big named clients, working with major banks, all these kinds of stuff, and so those are just some examples of what strategic partnerships can look in everything.

**Emily Lewis:** Yeah, I think Lea and I can personally speak to all of those scenarios. I mean, even just thinking back to what you were describing earlier on when I started out, and I certainly didn't do it this way, but there were a number of people in the industry who sent me work.

**Lea Alcantara:** Yes, yeah.

**Emily Lewis:** And on occasion we would email them and say, "Hey, I'm open. Do you have anything?" [Laughs] But I never viewed it as a partnership. That has now evolved for Bright Umbrella and Lea is really kind of leading this effort in our company where we are very intentionally looking at it as a partnership instead of just kind of being a bit passive in the sense of, "Oh yeah, I'll take some leads when they come my way and I'll occasionally let you know that I'm interested." We're much more intentional in terms of what we're asking for from those partnerships and also what we're offering them in return.

**Lea Alcantara:** I definitely think that a lot of the things that we might be talking about in this show, you might have tried already or have thought about, but I think part of the difference between like a business mindset versus a freelancer mindset is the strategy behind it and the intention behind it. So like Emily mentioned, yeah, we have reached out to our peers before, or with other agencies and



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

various other scenarios like Jake had already mentioned, but it was never strategic. It was more like I guess I should ask for it now. [Laughs]

**Timestamp:** 00:09:57

**Emily Lewis:** Yeah, things are slow. Maybe I should ask anybody if they have any ideas as opposed to kind of...

**Lea Alcantara:** Right.

**Emily Lewis:** I feel like we walked away from the HOW workshop where Jake kind of underscored these partnerships being like, "Okay, we're going to double down on this," that we're going to intentionally identify partners, agencies or creative people that we want to work with and really invest in trying to build that relationship with a hopeful goal that in the long run, we'll get some work out of it, but really approaching it from a "Let's get to know each other. Let's make sure you know what we do and we know what you do, and we know how to best work together kind of stuff," and being really intentional about it.

**Jake Jorgovan:** Yeah, and that intentionality definitely goes a long way. Some people will just kind of try this. Like I've seen a lot of people just try to set up partnership calls and they had this call and then they like think there's going to be work the next day.

**Lea Alcantara:** Yeah. [Laughs]

**Jake Jorgovan:** But the truth is like you have to invest time into these and so it's not just, you know.

**Lea Alcantara:** Yeah.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** But first, being like strategic thinking about who are good partners, how do I actually go and engage with him, but you also have to build trust.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** Because you have to get them to actually like and trust you and everything, and that takes time, that often takes figuring out how do you create value, how can you reciprocate to them. So I mean, one of the biggest things is to just figure out how can you create value for other people.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** And so whenever I'm looking to create strategic partnership, I often invite them to be interviewed in my podcast and I might refer those people to be interviewed on someone else's podcast to give them exposure, can I refer a potential client to them or send an article or resource to them that's useful, and all those things, like all those little touch points over time help build trust and they keep you top of mind.

**Lea Alcantara:** Right.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** And so in addition to like intentionally looking through those, you've got to think about how are you actually going to nurture and build those relationships.

**Lea Alcantara:** Right.

**Emily Lewis:** Absolutely. I want to get into that a little bit more, but first I want to back track to something you said, how do you identify these potential partners? So before you get into the



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

intentional and strategic outreach and then the nurturing of the relationship, if you haven't already or if you don't already know of an agency or a partner or whatever, how do you begin that process of identifying who you would want or should? What are the rules for deciding?

**Jake Jorgovan:** Yeah, so there are typically three categories of partners. I would recommend taking a look at that, and this is going to take some research and some kind of brainstorming on your side in order to figure out how to find these, but I mean, legitimately, I guess to like give you an idea, like I even went through this exercise recently as I'm starting this LinkedIn outreach company and I went through it and I was like, "Okay, let's find all the podcasts out there. Let's find the online summits or the speakers. Let's find a new one out there who's speaking about LinkedIn and is not offering a competitive service to what I'm doing." And so literally it was just kind of thinking of through what that persona of an ideal partner is and then just going out and finding those. So that's kind of I guess the high level of just thinking who that could be. But then there's also like to give you kind of more direction, there are three different typical categories that a partner could fall in. One would be like a partnership with a software vendor.

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** And so actually we talked about this in my presentation with Erik Reagan of Focus Lab.

**Lea Alcantara:** Focus Lab.

**Jake Jorgovan:** Yeah, where they basically, he's got a huge partnership with ExpressionEngine or not partnership, but they basically focus around that and kind of built their community around that software or that framework, and as a result of that, that became like a strategic partnership in a way by getting so involved and so closely tied in with that.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** There is a ton of businesses out there that are seeing great results from becoming Shopify partners or even Squarespace specialist in that sense. There are like Infusionsoft experts. There are Sitefinity or any of these other kinds of like platforms like Craft CMS I know you guys work with.

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** All of these are like software tools that you can build partnerships with, and if you actually get closely ingrained with the people that are running them or the communities around them, those can be great sources of work as well. So that's kind of like one different angle to look at them in.

**Emily Lewis:** Yeah, absolutely. Lea and I and our listeners especially from the EE community will know about Erik Reagan and Focus Lab, but a lot of our listeners actually started by focusing in ExpressionEngine because we're originally the EE Podcast, so that's something that I wouldn't be surprised that if you're listening, you're like, "Oh, I never thought of that as strategic partnership."  
[Laughs]

**Lea Alcantara:** [Laughs] Right.

**Emily Lewis:** You just thought of it as an area of specialty, of expertise, but if you took it to another level and really double downed on it, then it really would be that way, like for example, being a part of Craft's community partners or ExpressionEngine's... what's the name of their...

**Lea Alcantara:** The professional network.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** The professional network, and then keeping in touch with those people, not just signing up for it, but participating in the calls, participating in request for feedback. Like Jake was saying, you have to bring something to the table, too.

**Jake Jorgovan:** Yeah, and it's something where I have seen it, and it's harder once the technology or a platform is more mature.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** But if you get in the door early with a platform that you say, "This is going to grow," and you can build that relationship early on and like, I mean, that's basically what Focus Lab did. It was like they've gotten very early in with ExpressionEngine and helped kind of build that up. If you can get in early with that, like you can grow and ride the wave as that technology grows up.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** I've seen like Kurt Elster and his agency do this with Shopify where they just have massive growth in terms of their business as a result because they were in there very early and they saw Shopify as a growing trend. They really honed their marketing and their partnerships and everything around that and basically latched on and as Shopify has seen explosive growth over the past years, that has led to a ton of growth for their agency as well.

**Lea Alcantara:** So I want to focus a little bit about that, on the fact that it's like, "Oh, so they got in early and they saw that." It almost feels serendipitous though, right?

**Emily Lewis:** [Laughs]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** So what I want to do or try to figure out is how do you take away the serendipity and make it more data-based and intentionally-based, like what should you look for when you are figuring out the strategic partnership?

**Jake Jorgovan:** Yeah, I mean, I think with these software vendors, I don't know if I think there is a little bit of serendipity. I think it's honestly like it's almost like really choosing to dial down and invest in one of those. Like I'd take a look at similar advice that my buddies gave me about investing in the stock market to where he said...

**Lea Alcantara:** All right.

**Jake Jorgovan:** "You know, look at this company, and are they still going to be extremely relevant ten years from now?"

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** And so if you can kind of take that same mindset as you're kind of going through, you're doing your work, you run into new software tools that you're working with and you start to look at one and you say like you'd just kind of follow that. Squarespace is one that I love and I definitely just followed that company since they were very young, very basic in like how their platform ran and I've watched it basically grow into this massive company, and there was a period of my time where I was even doing Squarespace design and everything in like sort of rode that trend for a while. It's an interesting thing where I think it is just looking out and just being aware that that is an opportunity and you can't just go...

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** I don't think it works to try to go hunt down tools to partner with.

**Lea Alcantara:** Right.

**Jake Jorgovan:** But I think it does work to say, "Hey, we're starting to get work in this space. This is something that's interesting to us and we think this tool or this platform is going to grow. Let's see what we can do to kind of like leverage that or kind of hone around that."

**Emily Lewis:** And I think I would add just based on our own experience, and this is true for both our strategic partners with software providers as well as our strategic partners with other agencies, but for us, I think what kind of takes away some of that, maybe, yeah, I think the serendipity or maybe the risk is we know the people. It's not just that we use the tool and our clients are using the tool, but we know the people behind the tool as well.

**Jake Jorgovan:** [Agrees]

**Emily Lewis:** We have a relationship with them, and what that their doing aligns with what we are doing, so it's just a little bit deeper than the tool is useful for us. We also want to make sure that the relationship with the people feels genuine and aligns with our own values and business approach.

**Jake Jorgovan:** Yeah, I definitely agree with that as well. Getting to know some contacts with the company is essential in kind of growing that as well.

**Emily Lewis:** I think another thing that's worth mentioning, it's excellent suggestions on what you described to sort of identify potential partners that may be aren't in your radar. But lo and behold, Lea and I when we decided to get intentional about this, we just thought about people we've known for like ten years. [Laughs]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** We never ever thought to ask...

**Lea Alcantara:** For the job. [Laughs]

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** [Laughs]

**Emily Lewis:** Right, like ever. It's so funny because this always happens to us, but you know what, Lea, I'll let you describe it because you've really led our efforts in this area about how we really formed partnerships with people we've known for a decade.

**Lea Alcantara:** Yeah. I mean, the long story short, as Jake mentioned at the beginning of the show was when you're starting to figure out like what am I even looking for, how can we benefit each other and nailing that first and foremost, but when we did that, we realized we already knew people.

**Emily Lewis:** [Agrees] [Laughs]

**Lea Alcantara:** We already knew people that could [laughs], that fit that mold, and okay, it's sounds like I'm making it simple, but it isn't simple because it took us years to get to this point, but once we nailed that down, we did just literally asked for a small meeting. We listed exactly in front of us what we'd like to give and then we asked them what they would like from us, and because it was so clear how we could benefit each other, after those calls I think we closed like two new projects...



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

*Timestamp: 00:20:25*

**Emily Lewis:** Immediately.

**Lea Alcantara:** Immediately.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** It was one of those things where it's just like it literally blew our mind because it wasn't like they didn't know what we were doing before.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because they've known us for a decade. They've seen us at conferences.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** We've had conversations with them.

**Emily Lewis:** We've had them on this podcast.

**Lea Alcantara:** I know. [Laughs]

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** [Laughs]

**Lea Alcantara:** You know...



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** You know, it's insane.

**Lea Alcantara:** Yeah, exactly, and it's funny because how Jake mentioned that, it does take time, right?

**Jake Jorgovan:** [Agrees]

**Lea Alcantara:** And we have put the time in building these relationships. The problem was we never actually asked for the job. We never actually sat down and try to figure what value we brought.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And then when it was super clear, super specific what those things were and we just stated it to the people we had built those relationships with, they were like, "Yeah, checkmark, light bulb moment. Oh yeah, I have this thing that's happening right now that I need your help with."

**Emily Lewis:** Yeah, and I just wanted to underscore that for our listeners. It wasn't reaching out and saying, "Hey, you know, we do some Craft work and we do some design work and all of the things that we can do." It was really getting narrow, and for one of these engagements, we pitched accessibility work. We thought that was an area they didn't have a need that we could fill. We didn't bombard them with everything we could do.

**Lea Alcantara:** Yeah, absolutely.

**Emily Lewis:** Similarly, another agency that's very strong in CMS work, why would we pitch that to them? Instead, we offered Lea's design expertise. So it really was being specific. Not trying to say, "Hey, we can do everything." But saying, "Hey, we do this one thing really well and we think we can help you with that."



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** Yeah, and that specificity goes such as long way, especially with partners.

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** Like everyone thinks like, “Oh, I want to let these partners know all the different things we could do.”

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** But literally like they’re just like if they can’t put how they’re going to use you in a very clearly-defined box, like they’re not going to think to refer people to you, and so it’s like even with my consulting when it has been more general, I got referrals and stuff here and there because I was focused around this idea of like helping agencies and consultants win clients. It was niched, but as soon as I can have like the LinkedIn prospecting service, it’s like this is really, really specific.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** This is like very crystalized and clear on what this is. I emailed my partners in the same thing and I said, “This is exactly who I’m looking for, who is a good a customer for this?” And immediately you start getting referrals, but they need that kind of specificity.

**Lea Alcantara:** Yeah.

**Jake Jorgovan:** If you just try to give someone like a broad you know, like, “Oh, if you know anybody, send this our way. These are all the things that we can do.” They’re just not going to keep you top of mind when that specific exact need comes across.

**Lea Alcantara:** Yeah.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** I just wanted to add this one point, I feel like for me at least, it felt very difficult not saying, “Hey, we do all of this stuff,” because I was almost afraid that if we pitched something very specific and they didn’t need that specific thing, they wouldn’t think of us for any of the other five things we can do, which is a scary feeling [laughs] when you’re trying to get work. This is all to build leads, but if you’re specific like Jake said, you’re going to stay in their mind, you’re developing a relationship. This isn’t something that just happens with one call or one email or one anything. So let that fear go. Focus and stand on being valuable and useful to this relationship, and I think that was something that was emotionally [laughs] very difficult for me to be like.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** “How can we only tell them this one thing?” [Laughs]

**Lea Alcantara:** Well, the other thing that I also want to point out, and I think it’s still an ongoing struggle, especially if we’re doing this “Demystifying the Web” series is the fact that like right now actually, even now, we almost automatically went to our skill set. We’re like, “Oh, we can do design. We can do CMS, et cetera.”

**Emily Lewis:** Yes, good point.

**Lea Alcantara:** So that’s not the only thing you can be specific about. So let’s think about this, a lot of people who listen to the show know what we know.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** You know HTML. You know design, CSS, Craft, ExpressionEngine, so there’s got to be something else you need to figure out that’s different, and one of the things when we are having



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

these calls with these particular prospective partners, we don't just focus on the technology, but we also let them know what niche market we prefer.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So especially since we have software partnerships. For example, Emily and I and Bright Umbrella is a Craft CMS partner. For them to be able to point projects towards us, well, everybody in the Craft partners know how to do Craft. [Laughs]

**Emily Lewis:** So... [Laughs]

**Lea Alcantara:** So then what's different? Emily and I specialize in education sector, learning businesses, entrepreneurs and that nonprofit sector as well, and because we've stated that over and over and over again and became a lot of more intentional over that, more and more leads have come to us because they're like, "Hey, they do this, so even though all these partners can probably technically be able to execute the project, Lea and Emily know this type of people. Lea and Emily know this type of work, this type of organization and the subtleties that are necessary in order to be successful in a professional relationship because it is different working in different particular sectors and that knowledge, in order to actually fulfill the Craft CMS project is different as well.

**Emily Lewis:** Yeah. So Lea and I shared some of our personal experiences. This is something that we haven't done so I wanted to pose this question to you, Jake. In your experience in what you've seen with your clients, is it necessary to have like contracts or legal agreements when you do forge some type of partnership?

**Jake Jorgovan:** Typically, I've seen some people do it, but if they do, what I would typically recommend and see is people doing a very basic one-page contract. So with some people who literally write this up themselves, it would not even stand up in court probably, but just having like a



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

one-page contract that just clearly outlines what it is is pretty much what I see most people do. I don't see most people going out and doing full-length contracts for this just because like you're not exchanging money quite yet.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** And for the most parts like this stuff can be done completely on handshake agreements. Most of mine are just handshake agreements and then so the contracts give you like a little bit of clarity or just making sure people are aligned in expectations, but I see a lot of people not even actually take it that far.

**Emily Lewis:** Yeah, I think we've only signed something with one of our partners.

**Lea Alcantara:** Yeah.

**Emily Lewis:** I don't recall what, but it was something that they required because they had an established program for referring work.

**Lea Alcantara:** Yeah, yeah, and it is, and then basically the summary was just don't badmouth us and don't steal our clients.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** That's the gist of the legality. It was just more like just don't badmouth us and don't steal our clients.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** Yeah, and I'd say like the partnerships I have is like that that probably could be good at some cases, but again, those are good if the relationships go bad, you know.

**Emily Lewis:** Yeah.

**Jake Jorgovan:** But if you've got good people, then hopefully you don't need them, but that's pretty simple.

**Emily Lewis:** Once you do start involving clients or money, I think you should do whatever your standard documents are for subcontractors or whatever the terminology is when you outsource or if you become an outsourced resource to another agency. For example, one of our partners we did engage, they had their documents, we had ours, we all signed them just to cover everyone's general processes and stuff. So I don't think just because you may have an agreement, you should still do your normal general contracts when you are talking about engaging in a real project that involves clients and money. Let's talk a little bit about that nurturing aspect, Jake, before we kind of shift to talking about cold outreach.

**Jake Jorgovan:** [Agrees]

**Emily Lewis:** So when you have established a partnership, do you have some tips for how you nurture it, how you keep that relationship going over time?

**Jake Jorgovan:** Yeah, the biggest thing is to just think about how you can create value for those people, whether that's giving them exposure in some way, whether that's providing useful resources or information to them, whether that's kind of even just giving them some of their own tips on stuff. I think Nate with some of his Pardot work was even trying to like advise or help the companies as they were referring him work on how to improve their processes better. It's a matter of just thinking about like what can you do to create value or just continue to deliver something for those people, and if



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

you're putting out useful content, that can be helpful. Sometimes that's even really useful if it's going to keep you top of mind and everything like that.

But yeah, the biggest thing is just to think about creating value in some way, shape or form. Can you refer people to them? Can you send them contractors or employees that they could hire? Like what can you do to just show up on their radar at least once a month with something useful that's going to build trust and create value with them? That's really kind of the mindset with it and then just trying to have some sort of system to try to say, "Hey, monthly, let's check in on this." Or to have a list of them and just like once a month go through those and say, "Oh." Like doing YouTube, can it take any actions or is there anything we can do in just keeping those organized?" It just goes a long way to keep those touch points happening.

**Timestamp:** 00:30:15

**Emily Lewis:** And Lea, I think you can confirm this that we've had success taking that approach. It's actually one of the three foundations that Ilise suggested to us was to establish a regular outreach effort to people we already knew, people we already had relationships with and take that approach of being generous and trying to find something useful. I think the only thing we aren't doing, and it's simply because we're not a big enough agency to do this monthly, so I think for us, it's more like a quarterly outreach cycle where we're making sure that we're reaching out to our partners and the people on that list with something we hope is useful for them.

**Jake Jorgovan:** Yeah, and I think that that's like a cadence and then if something pops in your head, for example, I did a podcast interview recently. It's like a phenomenal interview. Man, I was just like, "Okay, I need to send this to all, like this, this, this and this person. Like this, I know that they're going to love this one."

**Emily Lewis:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** And so sometimes it's stuff like that as well where you just have that opportunity and it just pops in your head, and then at other times, it's quarterly just to make sure you don't let it get out of hand.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And I do think that it's important again. If you don't have a strategy, start now because if you just kind of like just do it on the fly, it will fall on the wayside because you'll get busy with actual work that you're doing, but if you have as schedule, then there are reminders to let you know like, "Oh yeah, I should check in with this person."

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I was actually on Slack chat. There's this subchannel on the Craft Slack chat called "shop talk" where we're just all literally talking just business and like how we're all running our businesses and all that fun stuff, and there's such a reluctance to follow up with people

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I know Emily and I had to get over that.

**Emily Lewis:** Yeah.

**Lea Alcantara:** Like we were like, "Are we being pests? Are we being annoying to these people?"

**Emily Lewis:** Yes.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** And the main thing is you can be annoying if you are annoying. [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Like if you don't think about the value and you'd send them like emails that make no sense or are not targeted to them or is not personable, yeah, of course, they're going to be annoyed. But if you are strategic and thoughtful and has actually thought about the value that you're bringing, like even if it is just a small like blog post that you think that they'd really like to read, why would they be annoyed if you think it's going to be useful to them. t

**Emily Lewis:** [Agrees]

**Lea Alcantara:** They wouldn't be annoyed because it's going to be useful to them, and persistence is not the same as – you're not a telemarketer.

**Emily Lewis:** Telling...

**Lea Alcantara:** Yeah, yeah. I think like everyone is like worried they're going to be a telemarketer of some sort, but let me tell you, persistence means dollars.

**Emily Lewis:** Yeah.

**Lea Alcantara:** There are so many times where a prospective partner or a prospective client, they just don't email you right away because they have a job, you know? [Laughs]

**Emily Lewis:** Right. [Laughs]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** They have a job like you have a job. Things get busy. They get a ton of emails, too, and sometimes they don't get back to me for a month.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that's okay, and nobody is upset about it really, like after you're like, "Hey, remember I sent you this email?" Sometimes it just takes two seconds, I mean, don't be accusatory in that email, but just be like, "Hey, I just want to check in if you've got this or if it went to spam or whatever," and half the time, that small follow up leads to a phone call, leads to a job.

**Jake Jorgovan:** Again, I literally wrote a blog post on this one this past week where I say that like the most valuable actions that I do is like the 30 minutes each week, that I follow up with people.

**Lea Alcantara:** Yeah,

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** Because it's like you've put that in there and I'm just like, "Oh," and literally I might send emails, "Hey, check in on this," and suddenly like, "Oh, yeah, sure," and then like, "Yes," and bye, and I was like, "Oh, that was easy." [Laughs]

**Lea Alcantara:** Exactly. [Laughs]

**Jake Jorgovan:** So it's like that, but it takes that follow up and I even did my follow ups this morning and everything, and yeah, I mean sometimes it's reaching out to a person or persons for the fourth time after not responsive and then I'm hitting them with a LinkedIn message, too, and a lot of times I'll be like, "Hey, I'm not sure if you've got my email," but it works and it converts people over and rather I have a rule that I don't take no responses a no.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** Yes.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** So unless someone gives me an actual no, I'm just going to keep following up weekly or every other week in terms of just saying in front of them and yeah, basically if they don't tell me flat out no, then I will typically keep going, and sometimes if they say no and I still think that they need what I am offering, I will actually sometimes fight that a little bit if I really think that they are a good prospect and they would benefit from it.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** And that's just the mentality of like if I really think I can help this person and I think that I'm like the best choice here, then like you'll kind of push back beyond that no a little bit.

**Emily Lewis:** I think it's really about – once again we've come to this theme all the time as designers and developers by trade who became business owners who are trying to run businesses. It can really feel extremely uncomfortable to do that, you know?

**Lea Alcantara:** [Agrees]

**Emily Lewis:** Like Lea was saying, she's under describing [laughs] what this kind of stuff we worry about.

**Lea Alcantara:** [Laughs]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** It's where we say, "Should we follow up? Is it okay to follow up?" We almost need each other to say, "Yes, do it." But this is how we're going to grow this business. This is how we are going to forge those relationships. It's not going to work any other way.

**Lea Alcantara:** Right.

**Emily Lewis:** And you can translate that mentality if you're not a fan of email, you're not a fan of calling, then apply it to in-person in forging those relationships, staying up on those, but either way, you have to put yourself out there with intention and persistence. I'll get off my soap box now.  
[Laughs]

**Lea Alcantara:** [Laughs]

**Jake Jorgovan:** [Laughs]

**Lea Alcantara:** But it really is a mind shift to get to this.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So like we're saying all these things, but it's definitely easier said than done to reach out, especially like if there has been radio silence. I think the most important thing Jake has said at this episode thus far is silence isn't a no.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Silence is not a no. There are several reasons why people don't respond right away. For example, like it could be as simple and as stupid as your email going to spam. It really can be that simple, and if you don't follow up, then you'll never know whether that that was the case and they



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

would have responded to you right away if you hadn't followed up, and again, if you have built a relationship with these people, why would they be upset for you reaching out?

**Jake Jorgovan:** I'll jump in real quick with that story I've been sharing with you guys right before the call here, but I literally had someone who I knew was a great prospect. I was following up with them, they were not responding. I called them, I found out my emails were going to their spam and they signed like a \$5,000 deal right there on the phone.

**Lea Alcantara:** Yeah.

**Jake Jorgovan:** And I was just like, "Oh, well, I really need to call these people after a while."  
[Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** You know, like it is just one of those things, but I have had that happen multiple times. We were talking about the spam issue before, but it can happen to anyone where you literally if they've got a firewall or they've got something set up on their side, your emails might just not be getting through and that's why I always do the LinkedIn outreach or I've even done Twitter or just whatever I could do to get in touch with someone, call them on the phone afterwards as well, and if they're not responding with those first three emails, try other means because you'll actually never know on that.

**Emily Lewis:** Yeah, excellent point. I want to make sure we do have an opportunity to talk about cold outreach, and I actually think it kind of goes in hand a bit with strategic partnerships if you're reaching out to partners you've never reached out to before where there is no established



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

relationships. So is that how you would define cold outreach, reaching out, there's no existing relationship?

**Jake Jorgovan:** Yeah, that's how I would say would be cold outreach, and then warm would be if maybe you've got some sort of connection or some kind of past engagement or mutual contact or something there, but yeah, I would say cold would basically be you found these people online. You'd think they look like a good prospect and you're going to reach out and try to directly kind of start a relationship or any sort of business right out of that.

**Emily Lewis:** Why would an agency consider a cold outreach as a strategy? What is the benefit of it?

**Jake Jorgovan:** So the things where most agencies sit is that they get all their work from referrals and word of mouth, which is good and that means you have a great business, you're doing good things, but often after a while you realize that's out of your control and extent.

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** And so a lot of times people then start adding content or blogging or other things to get more inbound leads, which is great, but again it's still can feel out of your control a bit as well. Those are definitely great things to do, but with outbound, it's something that you can consistently do, and if you actually get good at it, you get a good process going, you can kind of make it more predictable to where you can say, "Okay, I know if I'm going to send out five emails a day and one out of every 25 emails converts to do a phone call, out of every three phone calls I get one closed deal, then that's basically one deal a month." Like it can become more systematic so it's actually very good for I think developers who are very systematic with stuff. [Laughs]

**Timestamp:** 00:40:01

---



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** And so it often can be to the exact customers you want, too. As like Ilise I know talks about, there's good work and then there's great customers and then there's bad customers, and with outreach, you can really start to say, "Okay, I want to only go after these people," and it's really targeted. You can kind of do that with content. You can kind of do that hopefully with referrals, but a lot of times those can just be really anybody that comes through. With content, you're really saying, "Hey, here are a hundred companies. I'm going to go after these hundred companies. I can get the exact criteria of who I want to work with." And so those are just kind of some of the reasons why it makes sense to start adding this to the mix. I don't recommend people only on outreach because it is a long sale cycle, but it is a great tactic to add to the mix once you're ready to get beyond word of mouth and referrals.

**Lea Alcantara:** So a lot of people are resistant about trying cold outreach and I think maybe because there's a ton of common misconceptions about it. Why don't you speak a little bit to that and why there are misconceptions?

**Jake Jorgovan:** Yeah. So there are a lot of different ways that cold outreach are happening these days, and it's definitely a growing field, so literally over the past few years, there has been an explosion of software tools on the market that make it easy for anyone to mail merge and send messages out to thousands of prospects each week.

**Lea Alcantara:** Right.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** So that is happening more and more, and so that's like one way of doing this stuff, but honestly, I've seen some development shops have success with that, but I see a lot of them fail as well.

**Lea Alcantara:** [Agrees]

**Jake Jorgovan:** The ones that succeed tend to have very hyper-niched focus on a specific area, but there are some, but I typically see a lot of people fail at that as well, and I've ran some of those campaigns for development shops and they don't always tend to work that well.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** So that's like one method is like the mass outreach. You also have still cold email, but really highly personalized cold email where literally everyone is handwritten. You're literally kind of researching someone, you're writing them a message saying why it's worthwhile for them to meet with you and have a conversation. Those can also again be effective as well. It takes a lot more time and everything, but again, even if you do five of those a day, it could definitely book a good number of meetings from those, and then you've also got other outreach like the LinkedIn outreach aspect of it where you're kind of just connecting with people and starting conversations casually or even doing outreach, like I honestly look at podcast interviewing as a form of outreach where I really think you have the ability. With a podcast, you have the platform and you're basically creating value for the other persons that you can use interviewing as a form of outreach to start a relationship with someone.

**Emily Lewis:** Absolutely, I think we are a good example of that because we met you at the workshop, but then you asked us to be on your podcast, and then we want to do it on our podcast.  
[Laughs]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** [Laughs]

**Emily Lewis:** And I also feel like it's the kind of relationship where if we had clients who had needs, we'd feel super confident sending them your way. That's a perfect example.

**Jake Jorgovan:** Yeah, and again, that's where the podcast is sort of a great relationship builder. Otherwise, we probably would have met at the conference and may or may not have continued the conversation or talk after that.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** But then we're collaborating on this and who knows where this relationship could go in the future.

**Emily Lewis:** You know I think another thing that's worth mentioning about cold outreach, and I don't know if this is a misconception [laughs] because it was my reality for cold calling. So one of the things, Lea and I tried last year and part of this year was "outreach" campaign that included calling as well as emailing, and it was the worst thing ever. [Laughs]

**Jake Jorgovan:** [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** I mean, it's absolutely the worst thing ever. It got to the point where when I had a day that I had to make phone calls I dreaded it, just deep in the pit of my stomach. You have people who are annoyed that you've called them. They don't know who you are. They view you as a telemarketer. You have dozens upon dozens of just leaving messages and hoping they're being



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

heard and never hearing back, and it just feels really demoralizing with the cold aspect where you're putting something out there and there's like nothing back.

**Jake Jorgovan:** Yeah, cold calling I think there are fields that it still works in, but probably selling software development services or design services is probably not one where it will work too well. Occasionally, it can still work well for some product companies or software companies, but for selling customized development services, it can definitely be challenging. I did one interview with a guy on my podcast who is obsessed with cold calling, [laughs] and he has built a system around it, but I think it takes a certain person to weather that. He knows that it takes some 125 calls to close a deal.

**Emily Lewis:** Uh.

**Jake Jorgovan:** That's like...

**Lea Alcantara:** 125? [Laughs]

**Jake Jorgovan:** I know, but then he calculates it down and he's like, "So every time I pick up the phone, I'm making \$4 because I know that is going to like every single call that's worth \$4 and you run all those and like that based off, it's like deal side." But again, like for to send down who hates that trajectory is probably a terrible idea versus finding another tech to get it to work, like it's just one tactic, and just a thing that I think a lot of people don't just think what's marketing and stuff like this because it's one of many tactics or routes you can go to get toward your objective so you don't have to cold call to build a successful business.

**Lea Alcantara:** I do think part of the reason why our cold calling wasn't as successful as well was that it wasn't as targeted. I mean, we tried to. We tried to narrow it down, but I feel like the list of the people that we were looking at and contacting, I feel like they really weren't the right fit.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because when we did some cold emails to people that were very much the right fit, for example, we went to HOW Design Live, but there were a few people that we wanted to talk to and we actually never met, never saw their presentation, never all this stuff, but we saw from their bio, from all these different things that like, “Hey, I think there’s something that might be aligned with us,” and when we sent them cold email, they don’t know us from Adam, but it was a strategic email.

**Emily Lewis:** If...

**Lea Alcantara:** Yes. Strategic, very clear, et cetera, again how we’re aligned, immediate feedback. I remember even like commenting to Emily where we’re like, because usually we schedule this in and we tend to do it around the same week so Emily and I get cc’ed over like all these things, and then we were shocked that we actually got appointments [laughs] from them that week.

**Emily Lewis:** Yeah.

**Lea Alcantara:** It was crazy. It was just like, “Well, so the difference is targeting.” [Laughs]

**Emily Lewis:** Well, I think it’s the specificity again.

**Lea Alcantara:** Yes, yeah.

**Emily Lewis:** I think we learned some stuff with the success of the strategic partner outreach.

**Lea Alcantara:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** And with specifically coming off of HOW with all of the good information we got from Jake and Ilise and everybody at that workshop, we then started trying to be more strategic with that cold emailing, more personalized. [Laughs]

**Lea Alcantara:** Yeah, yeah, right.

**Emily Lewis:** I think our cold outreach was too much trying to sell and not enough about trying to form a relationship.

**Lea Alcantara:** Yeah, yes.

**Emily Lewis:** I think that's what's wrong, maybe.

**Lea Alcantara:** Yeah, I do think that changing angle and that tactic really makes a difference, and here's the other thing too, and it's something that I think some designers and developers also need to get over to is don't be intimidated over the contact their credentials as well because they're also running their own thing and as long as you bring value to them, they'll respond to you. So we've spoken to people who've done major things for major companies and they gave us the time of day.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So don't feel intimidated as long as you think through what value you can bring and don't look at it as a sales pitch.

**Emily Lewis:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** Yeah, one thing I want to kind of add on there is that one of the biggest mistakes I see people make with any form of cold outreach or a lot of times really any sort of email or just digital communication with customers that they try to make the sale in the email.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** And I always try to tell people like, “No, that the goal is a phone call.” Like that’s you’re trying to get to a phone call, start a relationship, and then once you have that, then you make the sale, and I see a lot of people, whether that’s an inbound lead or they’re doing outbound cold emailing or even when they respond to someone who’s like in the cold email and says like, “Oh, hey, can you tell me a bit more about yourself,” and they go into a full sales pitch.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Yeah.

**Jake Jorgovan:** You just want to pique interest and get to the call, like that’s the goal, that is step one.

**Emily Lewis:** It’s such a good point, and Lea and I still struggle with this today. I think what we found helpful, and this certainly takes time and why we can really only fit outreach in like once a quarter, but we work together to draft those message.

**Lea Alcantara:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** We hold each other accountable to literally have a list of, “Are you talking to the person’s need? Are you being generous?” It’s like so we have to read our content and make sure we’re hitting those points, so it takes a little bit more time to draft those emails, even for a cold outreach.

**Lea Alcantara:** Yeah.

**Emily Lewis:** But once we’ve gotten to the point of an email that’s very focused and really working, it then becomes like a template. So it took some upfront work to really hold each other accountable to our messaging, but then it does become something that we can sort of – I don’t want to say crank out because we don’t ever crank this stuff out. We do try to personalize it, but essentially generate them more quickly.

**Timestamp:** 00:50:07

**Lea Alcantara:** Yeah. There is so much temptation, and I know that Emily definitely pushes back on this where, because I do most of the sales emails, I want to already put the price. I already want to lay it.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** I already want to put the description of the services and Emily will always be like, “That that out.” [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** “Just mention in one sentence what we could possibly do for them to benefit them, and if they want to talk more about it, here’s the scheduling link to get them on a call.”



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because then at that point, we can get tone of voice, interest, et cetera and so forth.

**Emily Lewis:** Well, even see if we like them, too.

**Lea Alcantara:** Yeah, exactly. That's so important, too, to really, really drive down. Make sure you want to work with these people, too. [Laughs]

**Emily Lewis:** Yeah. So Jake, before we wrap up, do you have any suggestions for good measurements or metrics to know if your cold outreach or even your strategic partnerships are being successful? Like it took us a way too long I think of hating cold calling before we dropped it.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** How do you know when to do that?

**Jake Jorgovan:** Yeah, so I'd say on the strategic partnership side, I set up a simple CRM on my side. I have like ideas for strategic partners, that's one column as I'm just researching fine people that I might want to set and book eventually. I have like a partnership created. This is where we've had the discussion or we've met and I know that they can be a really good referral source. I have another one, that's a column, that's like an attempted referral, so that's another state, so that means they've tried to send someone my way, which is kind of an intent like, "Hey, this is actually a really good partner. They're actually sending potential prospects."

**Emily Lewis:** [Agrees]



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** And then I have another one just saying, “Deal closed,” which means they’re actually a partner who has referred a customer who signed on, and so that’s kind of the way that I look at it as I go out and I build up strategic partners and how I keep it organized at least from the partnership side, and then on cold outreach, I really look at it as in terms of like the biggest metric is how many calls you booked and then how many of those actually are qualified potential customers. I don’t care much about open rates or stuff like that. Like you can kind of get into those, but I really just look at those bottom metrics and you can kind of optimize open rate if you’re doing enough of them, but really just looking at the calls booked and the quality of relationships and deals that actually come out of that is really the metrics to measure.

**Emily Lewis:** Yeah, and just to offer the suggestion that Lea and I offered in our episode with Ilise, beyond that sort of data-specific information like Jake was mentioning to you could track in a spreadsheet or CRM, although Lea and I did the spreadsheet thing and it really becomes hell after a while so we’re invested in CRM. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** But for the things that are less tangible, that are less data and they’re more like, “Oh, I feel like this happened because of this.” We have a marketing success spreadsheet and maybe we just got a nice email from somebody once or Lea was on a call and they make a nice compliment about a blog post we wrote, so it’s nothing truly measurable in the sense that something has been closed or anything, but they’re just general feelings of like, “Yeah, I think we’re on the right path. Let’s make sure to note this so we realize we’re on the right path.”

**Jake Jorgovan:** Actually, I like that.

**Lea Alcantara:** So Jake, do you have any final advice or resources about strategic partnerships?



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** I'd say the biggest thing is just to think if there are software vendors or platforms that you could partner with, think through it or any influencers out there who are speaking to your audience of customers that you could partner with, and then third would be, are there any other businesses out there that sell complementary products or services to the same market that you have. So just trying to think through those three criteria as a framework as you're brainstorming strategic partnerships, those should hopefully help people kind of get a good direction there.

**Emily Lewis:** How about advice or resources for cold outreach?

**Jake Jorgovan:** Cold outreach, I'd say the biggest advice I have is you have to be comfortable with getting nos with that and a lot of no responses.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** But it's something that again you can't expect to just send ten emails and not ever follow up and you're going to get business. You have to commit to it. You have to say, "Hey, we're going to send a hundred emails at least before we give up on this, and we're going to send four to five follow ups on this and try to touch point through social media." So don't go send ten emails and then come back saying cold outreach doesn't work.

**Lea Alcantara:** Fair, fair.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** So that's all the time we have for today, but before we finish up, we've got our rapid fire ten questions so our listeners can get to know you a bit better.

---



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** All right.

**Lea Alcantara:** Are you ready, Jake?

**Jake Jorgovan:** I'm ready.

**Lea Alcantara:** Okay, first question, introvert or extrovert?

**Jake Jorgovan:** Introvert.

**Emily Lewis:** The power is going to be out for the next week, what food from the fridge do you eat first?

**Jake Jorgovan:** Oh, I'd say pineapple just because it's on top of mind right now and I just ate a bunch of pineapples before this call. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** What's your favorite website for fun?

**Jake Jorgovan:** Favorite website for fun is probably Vimeo Staff Picks.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Oh.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** What's the last thing you read?

**Jake Jorgovan:** The last thing I read, I'm currently reading *Sapiens*.

**Emily Lewis:** [Agrees]

**Jake Jorgovan:** So yeah, crazy book about the history of humankind.

**Lea Alcantara:** What's the best piece of professional advice you've received?

**Jake Jorgovan:** Read *How to Win Friends and Influence People*, a game changer of a book.

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** So yeah. [Laughs]

**Emily Lewis:** What's the worst piece of professional advice you've received?

**Jake Jorgovan:** Someone who says of hiring a bunch of employees is success in business.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** What's your favorite color?

**Jake Jorgovan:** I've always like orange as a kid, but I don't really know why, so it's orange or blue, I don't know.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Emily Lewis:** [Laughs] If you could take us to one restaurant in your town where would we go?

**Jake Jorgovan:** I currently live in the middle of nowhere so I don't really have any.

**Emily Lewis:** [Laughs]

**Jake Jorgovan:** But if I were back in Nashville, I'd take you guys to Calypso Café.

**Emily Lewis:** What kind of food that is?

**Jake Jorgovan:** It's Mediterranean.

**Lea Alcantara:** Oh.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** What's your favorite board game?

**Jake Jorgovan:** Oh, we have quite a collection. Let me take a look, Monopoly Deal is quite a good one.

**Emily Lewis:** Oh.

**Jake Jorgovan:** Scattegories.

**Emily Lewis:** I love that game.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Jake Jorgovan:** And there's Mastermind. I'm just looking – The Game, there's actually one called The Game, which is a cooperative one. That's another one. So I just glanced over my board game shelf.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** All right, last question, Hulu or Netflix?

**Jake Jorgovan:** Netflix.

**Lea Alcantara:** Very cool. So that's all the time we have for today. Thanks for joining the show.

**Jake Jorgovan:** Thanks for having me on here.

**Emily Lewis:** In case our listeners want to follow up with you, where can they find you online?

**Jake Jorgovan:** All my blogging and content is at [jake-jorgovan.com](http://jake-jorgovan.com) so that's where you can find podcast blog, all that kind of stuff, and then if you're interested in the LinkedIn lead generation service that I've recently spawned, that is at [leadcookie.com](http://leadcookie.com).

[Music starts]

**Emily Lewis:** Awesome, thanks again for joining us, Jake. This has been another chock-full of practical information episode. We really appreciate it.

**Jake Jorgovan:** Well, thanks for having me on.



<https://ctrlclickcast.com/episodes/strategic-planning-cold-outreach>

---

**Lea Alcantara:** CTRL+CLICK is produced by [Bright Umbrella](#), a web services agency invested in education and social good. Today's podcast would not be possible without the support of this episode's sponsors! Many thanks to [Foster Made!](#)

**Emily Lewis:** We'd also like to thank our partner, [Arcustech](#), who wanted an extra shout out at the top of this episode.

**Alcantara:** And thanks to our listeners for tuning in! If you want to know more about CTRL+CLICK, make sure you follow us on Twitter [@ctrlclickcast](#) or visit our website, [ctrlclickcast.com](#). And if you liked this episode, please give us a review on [iTunes](#), [Stitcher](#) or both! Links are in our show notes and on our site.

**Emily Lewis:** Don't forget to tune in to our next episode when we have Jamie Strachan to talk about mental health and debugging our feelings. Be sure to check out [ctrlclickcast.com/schedule](#) for more upcoming topics.

**Lea Alcantara:** This is Lea Alcantara ...

**Emily Lewis:** And Emily Lewis ...

**Lea Alcantara:** Signing off for CTRL+CLICK CAST. See you next time!

**Emily Lewis:** Cheers!

[Music stops]

**Timestamp:** 00:57:45