

REV UP YOUR BUSINESS

What to get ready for in 2027

Ryker Taylor · Wundertre · August 20, 2026

Customer-exclusive session · This session is being recorded

Tonight

01 **Section 1** — The Omni-Revenue Framework: the system that doesn't expire

02 **Section 2** — AI: the concepts that outlive the tools

03 **Section 3** — Data, targeting & attribution: the moat

Q&A The last 20+ minutes are yours

One worksheet. Three things to do Monday. Bring a pen.

**The tools will change.
The system doesn't.
Build the system.**

LIVE POLL

How many new marketing or sales tools did you try in the last 12 months?

0-1

2-3

4-6

I've lost count

Room and stream both vote. We'll talk through the results before moving on.

OPEN

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Why 2027 is different

- For three years running, the answer to “what should I do next year?” has been a tool name. That's exactly why everyone is exhausted and no further ahead.
- The businesses that pulled away in 2024-2026 didn't pick better tools. They built systems that could absorb new tools without rebuilding everything.
- 2027 widens that gap rather than closing it — because the cost of tactics is collapsing toward zero while the cost of judgment, data, and coordination is going up.
- **So tonight: three things that are still true in eighteen months.**

01

A system for growing revenue that doesn't care what year it is

Your buyer's actual last 24 hours

1

Saw you on LinkedIn

2

Checked your reviews
on Google

3

Got your email

4

Called and talked to
whoever answered

If those four felt like four different companies, the sale is already gone. They just haven't told you yet.

Revenue isn't something you chase.
**It's the byproduct of a unified,
frictionless customer experience.**

Why a framework outlives a tactic

- Tactics have half-lives. Organic reach, a specific ad format, a specific channel — every one of them decays, and the decay is accelerating.
- A framework describes what has to be **true** for revenue to happen. Those conditions haven't changed in decades.

Five questions every business answers regardless of what tools exist:

Do you know who you're chasing? Do you show up where they are? Does interest become business without friction? Does a closed deal make more deals? Can you see what drove the money?

- **When a new platform launches in March, you don't rebuild your strategy. You ask which tenet it serves and plug it in.**

The five tenets

- 1 Omni-Insight** Know before you grow
- 2 Omni-Presence** Be everywhere that matters
- 3 Omni-Narrative** Tell the story that converts
- 4 Omni-Service** Deliver and delight
- 5 Omni-Tracking** Measure everything, close the loop

Omni-Insight

Know before you grow

IS

Your brand, your offer, your buyer, your competition — documented, not assumed.

DONE LOOKS LIKE

A one-sentence brand promise no competitor could copy verbatim. 2–3 personas defined by behavior and intent. Top 3–5 competitors mapped, including their 1-star reviews — that's where the unmet demand is.

COMMON FAILURE

Personas that are demographics and a stock photo. *“Homeowners 35–55” is not a persona. “Someone who just got a repair quote they don't trust and is Googling at 11pm” is.*

2027

As targeting signals get more restricted, knowing your buyer's actual behavior becomes the input everything else runs on. You can't outsource this to a platform anymore.

Omni-Presence

Be everywhere that matters

IS

Not everywhere on the internet. Everywhere in **your specific buyer's** internet.

DONE LOOKS LIKE

3-5 channels chosen from the persona work. Platform-native content carrying one identical promise. Sequenced touches — awareness, then retargeting, then search capture. Listings accurate, reviews answered in voice.

COMMON FAILURE

Nine platforms badly instead of four well. Or the same post cross-published everywhere, native to nothing.

2027

Content production cost is collapsing. Volume stops being a differentiator; coherence becomes one. Everyone can make 40 posts a week now. Almost nobody can make 40 that sound like one company.

Omni-Narrative

Tell the story that converts

IS Sales as the frictionless continuation of the marketing conversation.

DONE LOOKS LIKE Every lead arrives with its full journey attached. Sales language matches the marketing language that attracted them. Booking instant, quotes in minutes, signing and payment frictionless. Follow-up runs itself.

THE BIG ONE The handoff. Not a marketing problem, not a sales problem. A **seam** problem. They get a perfectly targeted ad, then a generic “hey, just following up!” that could have gone to anyone.

2027

Buyers have less patience every year for restarting the conversation. The seam gets more expensive.

Omni-Service

Deliver and delight

IS

A closed deal isn't revenue locked in. It's revenue at risk.

DONE LOOKS LIKE

Automated kickoff the moment a deal closes. Proactive Day 7 / 14 / 30 check-ins. A named human. SLAs communicated — **customers tolerate problems, they don't tolerate silence.** Satisfaction measured after every resolution. A real referral engine with tracked payouts, not a hopeful “tell your friends.”

COMMON FAILURE

Treating the close as the finish line. Everything post-sale gets the leftover budget — while it's the most important marketing the business will ever do.

2027

As acquisition costs rise, the winners are the businesses whose existing customers manufacture new ones.

Omni-Tracking

Measure everything. Close the loop.

IS

Every other tenet either runs on evidence or runs on assumption. This decides which.

DONE LOOKS LIKE

Every lead, deal, and customer traceable to what produced it. Calls tracked like form fills. Ad data joined to **pipeline** data. Cost per customer and lifetime value **by channel**, not by campaign. Dashboards that actually get read.

COMMON FAILURE

Reporting that measures activity instead of money. Impressions, reach, engagement — none of that is revenue.

2027

We're spending a full half hour on this later, because I think it's the whole ballgame.

**Running Presence spend on top of an empty
Insight tenet is
technically possible, reliably expensive, and
usually disappointing.**

It's a flywheel, not a checklist

- All five run at the same time. Tenet 5 feeds back into tenet 1.
- Churn data refines your personas. Referral data tells you which customers to go clone. Support tickets become your content strategy.

CYCLE 1

Sets a baseline.

CYCLE 2

Sharpens with real data.

CYCLE 3

The referral engine is producing and acquisition cost starts *dropping*.

- **Systems compound. Campaigns don't. That's why the business that started this eighteen months ago is out of reach now.**

Score yourself: where does your revenue leak?

Five tenets. Four checkboxes each. Rate 1–5. Three minutes, and nobody's collecting these.

- | | | | | |
|---|----------------|---|---|-------|
| 1 | Omni-Insight | Do you know who you're chasing? | ☐ ☐ ☐ ☐ | ___/5 |
| 2 | Omni-Presence | Do you show up where they look? | ☐ ☐ ☐ ☐ | ___/5 |
| 3 | Omni-Narrative | Does interest become business without friction? | ☐ ☐ ☐ ☐ | ___/5 |
| 4 | Omni-Service | Is every customer a growth engine? | ☐ ☐ ☐ ☐ | ___/5 |
| 5 | Omni-Tracking | Can you see what drives the money? | ☐ ☐ ☐ ☐ | ___/5 |

Your lowest-numbered tenet scoring 3 or below is your 2027 priority.

Which tenet did you score lowest?

Omni-Insight

Omni-Presence

Omni-Narrative

Omni-Service

Omni-Tracking

Most rooms score lowest on 1 or 5. We'll come back to the results in Q&A.

02

I'm going to teach you almost no tools tonight. On purpose.

Why I'm not giving you a tool list

- Some of you registered hoping for the ten best AI tools. That list has a shelf life of about four months — I've watched it turn over twice already.
- Tool-chasing is a treadmill: spend the learning curve, reach competent, the tool changes, start over. Net skill gained: roughly zero.
- *(Callback to the poll — the “lost count” crowd. That churn is the problem, not the solution.)*
- **What compounds instead: understanding what these systems fundamentally do, so a new tool takes you a week to evaluate instead of a quarter.**

AI accelerates whatever system you already have.

If your system is broken, AI just gets you to broken faster.

Think in capabilities, not products

Every AI tool that will exist in 2027 is some combination of five things:

- 1 Generation** Creating net-new content. Most visible, most commoditized, least defensible.
- 2 Extraction & structuring** Turning mess into data. Call transcripts into deal notes. PDFs into spreadsheets. *Wildly underrated, and probably the biggest untapped win in this room.*
- 3 Analysis & reasoning** Finding patterns across more information than a human will read. *"Read these 400 reviews and tell me the three complaints to fix."*
- 4 Retrieval** Grounding answers in **your** material instead of general internet knowledge. The difference between sounding smart and being right.
- 5 Agency** Taking multi-step action in real systems, not just producing text. Newest, fastest-moving, highest stakes.

Next time someone pitches you an AI tool: don't ask what it does. Ask which of the five it is, and which one it's actually good at. Most claim all five and are good at one.

**The model isn't your
advantage.
What you feed it is.**

Context is the moat

- The models are converging. Whatever is best today gets matched within months, and everyone in your industry has the same access at roughly the same price.
- Your brand voice, your personas, your objection handling, your pricing logic, your best sales calls, your actual customer data — **that** is proprietary, and nobody can copy it.
- **Straight back to Tenet 1:** the businesses that did the Omni-Insight work have something to feed these systems. The ones that didn't get generic output, because generic input is all they have.
- Garbage context, garbage output — and it's worse than useless, because it's *confidently* generic. It looks like work.
- **This gets more true as the models improve, not less. When capability is a commodity, the input is the whole game.**

The delegation ladder

Three rungs. Most businesses try to jump straight to the third.

1 · Assist

AI drafts, a human edits and approves every time. Low risk, immediate savings, and the fastest way to learn what it's actually good at. **Start every new use case here. No exceptions.**

2 · Automate

AI runs a defined, repeatable process; a human spot-checks a sample. Appropriate once you know its failure modes.

3 · Delegate

AI acts independently inside guardrails; a human reviews exceptions. High-volume, low-stakes, easily reversible work only.

Where does the human sit? At the point where being wrong is expensive. Not every step — that defeats the purpose. The expensive step.

**You don't promote a task up the ladder
because the tool got better.**
**You promote it because you've seen it fail
and you know what failure looks like.**

The sameness trap

- When everyone has the same tools and prompts them the same way, output converges. You can already feel it in your inbox and your feed.
- **The paradox: as production gets cheaper, taste and distinctiveness get more valuable, not less.**
- Voice drift is the specific risk. You scale content 10x and it slowly stops sounding like you. Nobody notices in week one. Everybody notices by month six.
- **The defense:** a documented voice (Tenet 1 again), and a human who owns the standard and is empowered to reject output that misses it.

The goal isn't more content. It's more content that could only have come from you.

Where AI actually moves revenue right now

PLAY	TENET	WHY IT MOVES MONEY
Speed to lead — instant, contextual response to inbound	3	Highest-ROI use available. Response time is still the most under-optimized variable in most businesses.
Extraction from conversations — calls and emails into structured data	1 + 5	Turns your unstructured pile into the context and attribution data every other tenet needs.
Personalization at scale — messaging matched to the real journey	2 + 3	Kills the handoff seam. Was economically impossible three years ago.
Tier-1 support deflection	4	Frees humans for the moments that build referrals, not the ones that reset passwords.
Analysis you'd never staff for — reviews, tickets, churn, competitors	1 + 5	Nobody was going to read 400 reviews. Now somebody does, weekly.

What not to automate

- Anything where being wrong is expensive and hard to reverse — pricing negotiation, contract terms, crisis communication.
- The relationship moments. A delighted customer who receives an obviously automated thank-you is now a **less** delighted customer.
- Final judgment on anything that goes out under your name.

You can automate the drafting. You cannot automate the accountability.

03

The one that separates the pretenders from the contenders

Why this is the moat in 2027

- Three things happened at once: third-party signal decayed, privacy rules tightened, and the platforms got much better at grading their own homework.
- **Net result: businesses that own their data have a durable advantage over businesses renting it from platforms — and it compounds every quarter.**
- The uncomfortable version: most reporting today is a pile of numbers each platform reports about itself. Add them up and you've attributed 180% of your revenue. Everybody's a hero. Nobody knows anything.

**Could you tell me right now
which channel produced
your most profitable
customer last quarter?**

Yes, precisely

Roughly

No

No wrong answers, and nobody's watching your vote.
We'll look at the split together.

Modern targeting: what actually works now

First-party audiences beat everything

Your CRM list, your customers, your site visitors. Owned, portable, immune to whatever the platforms do next.

Lookalikes are only as good as the seed

Almost everyone seeds from *all* customers. Seed from your top 20% by lifetime value and the same tool produces radically different results. A Tenet 1 dependency in disguise.

Intent beats interest

Behavior showing someone is in-market now, versus demographics suggesting they might be a fit someday.

Identity resolution

Connecting the anonymous visitor to the known contact. Makes everything downstream possible.

Suppression is targeting

Excluding current customers, closed-lost, and bad-fit segments is the cheapest performance gain available, and almost nobody does it.

Retargeting: surrounding vs. stalking

You've all been on the receiving end of the bad version — same ad, 60 times, three weeks, including after you bought.

WHAT GOOD LOOKS LIKE

Sequenced	The message changes with how far along they are. Someone who read a blog post gets something different than someone who abandoned a booking form.
Frequency-capped	There's a point where more impressions actively reduce conversion. Find it.
Time-bound	A 7-day window and a 90-day window are different strategies. Choose deliberately.
Suppressed on conversion	If they bought, stop. Should be automatic. Usually isn't.

The multi-touch reality

- Nobody sees one ad and buys. The buyer doesn't experience your campaigns as separate — they experience one question: *"do I know this company?"*

Demand creation

Makes people want the thing. Hard to measure, slow payback, and the only reason demand capture works.

Demand capture

Catches people who already want it. Easy to measure, fast payback, takes all the credit.

- **The trap:** measure on last-click, demand creation looks like waste, so you cut it. Six months later capture volume collapses and nobody can explain why.
- **This is the Tenet 2 argument with numbers behind it. Presence isn't vanity. It's what makes capture cheap.**

Attribution models in plain English

MODEL	CREDITS	ANSWERS	WHERE IT LIES
First touch	First interaction	What creates demand?	Ignores everything that closed it
Last touch	Final interaction	What closes?	Wildly over-credits branded search and retargeting. This is the default in most reporting and the most expensive mistake in this room.
Linear	Everything equally	What's involved at all?	Treats a 3-second impression like a 40-minute sales call
Time decay	Recent touches more	What's warming them near the close?	Under-credits long consideration cycles
Position-based	First + last weighted	What opens and what closes?	A reasonable practical default for most of you

Three things to actually do about it

- 1** **There is no correct model.** There's only correct for the question you're asking.
- 2** **Pick one as primary and hold it constant.** Consistency over time beats accuracy in a single snapshot — you're looking for direction of travel.
- 3** **Then run first-touch and last-touch side by side.** The gap between them is the most useful report almost nobody runs. It tells you which channels open doors and which get the credit.

The practical stack

UTM discipline

Boring, unglamorous, and the #1 reason attribution reports are garbage. A written convention everyone follows. **If you fix nothing else from tonight, fix this.**

Call tracking

For most businesses in this room the most valuable conversions happen on the phone and are invisible in reporting. Dynamic number insertion closes the hole.

Pixels + server-side

Browser-only tracking loses more every year. Server-side is no longer an advanced play.

The CRM as single source of truth

Not the ad platform — that's a vendor reporting on itself. Your CRM knows who actually paid you.

Offline conversion import

Feeding real revenue back so platform optimization aims at customers instead of form fills. This is the step that separates the top few percent.

The metrics that actually matter

- **Cost per lead is a trap.** The cheapest leads are frequently the worst ones, and optimizing toward CPL actively degrades your business.
- Measure **cost per acquired customer by channel, joined to lifetime value by channel.** That's the number. Everything else is a proxy.
- Two channels with identical CPL and 3x different LTV are not comparable channels — and CPL will never tell you that.
- **Sales velocity** — $\text{deal size} \times \text{win rate} \div \text{cycle length}$ — is the most underused number in small business. It tells you where to push.

Everybody's got a dashboard. Very few can tell you which channel produced the customers still paying them a year later.

That's the difference. It isn't budget. It isn't talent. It isn't which tools you bought.

Three things

- 1 The system doesn't expire.** Five tenets, in order, running as a loop. New tools get plugged into it, not layered on top of it.
- 2 AI is an accelerant, not a strategy.** Learn the capabilities, own your context, delegate deliberately, keep the human where being wrong is expensive.
- 3 Data and attribution are the moat.** The cost of not knowing has never been higher, and 2027 is the year it stops being survivable.

Do these three things Monday

- 1** **Fix your UTM convention.** One document, everyone follows it. Free, boring, and it makes every other measurement decision possible.
- 2** **Take your lowest-numbered weak tenet and pick one thing.** Not a plan. One thing, done inside 30 days.
- 3** **Put one AI use case on rung 1 of the delegation ladder.** Assist only. Run it 30 days before you promote it.

Recording + slides: sent within 48 hours

Worksheet: [link]

Questions after tonight: [contact]

The tools will change. The system doesn't. Build the system.