Marketing Ball

Lessons on Attracting More Clients
From the Marketing Coach

Robert J. Middleton

Legalities

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Please note that this is the "pre-publication version" of Marketing Ball. Although it has been proofed extensively, there still may be some typos or other errors. I sincerely hope you enjoy it and that it helps you be a better marketer of your professional services.

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Prologue

My name is RJ. I started my consulting and coaching practice when I was thirty seven, after spending thirteen years in the management consulting business. I worked for three firms during that time, ultimately gaining a reputation as someone who helped his clients achieve extraordinary results. However, despite my success, the pressures of the business, long hours and travel took their toll and led to burnout.

After a six-month break I decided to start my own consulting and coaching practice focused on local, mid-sized companies who were struggling with communication, productivity and leadership. My first clients came through referrals from existing clients, but tapered off after about two years.

I woke up one day realizing I had virtually no new business in my pipeline, and it was no mystery as to why. I had completely neglected to market myself. I'd always viewed marketing as somehow beneath me. When I was working for my last firm, I was often brought in to talk to prospective clients and help close the deal, but I had never been a rainmaker, preferring to focus on client projects. Big mistake.

Here I was, almost 40, with a mortgage, a car payment, unmarried (I'd been wedded to my work), and no prospects in sight. My income that year was about half of what it was the previous year. It was frustrating that my consulting and coaching work had always been highly praised by my clients, but the referrals were not coming fast enough. I started to lose confidence in myself and considered returning to my old firm who had left the door open.

But that's not what I wanted. I wanted to be successful on my own. I enjoyed my independence, calling my own shots, and working locally instead of in a new city every week. As I explored my options, I kept coming back to one inescapable truth: I would need to learn how to market and sell my services or I'd be out of business within a year.

I bought a few books on small business marketing, and attended workshops on marketing and selling. But my resistance to marketing was so high, that I did little with what I learned. It wasn't getting better; it was getting worse.

Then I had a chance conversation with an past associate from my second firm who had also gone out on his own. He told me that he'd also struggled with marketing himself until he met a marketing coach named MC.

"RJ, when I started to work with MC I was desperate like you. And I was skeptical that anyone could help me. But over a few months of working with MC I turned things around completely. In a year I more than doubled my income and am now attracting my ideal clients consistently. I'd be happy to introduce you to him."

An Introduction to MC, the Marketing Coach

It sounded too good to be true, but my friend called MC who then sent me a very interesting report on what it took to successfully attract more clients. He also sent some information on the clients he worked with and a detailed write-up about his marketing coaching program.

MC worked primarily with professional service businesses such as management consultants, executive coaches, corporate trainers, marketing and financial professionals. They were much like me, professionals who were self-employed, who loved working with their clients but were not very good at attracting new ones consistently. Some were struggling like me; others wanted to take their business to a much higher level.

On the strength of my friend's recommendation and the fact that MC worked with people exactly like me, I contacted him and set up what he called a 'Marketing Strategy Session.' He also asked me to fill out a questionnaire, with in-depth questions about my business and current marketing activities, to be sent back to him before our session. Just filling out this questionnaire got me thinking about my business, goals and direction in ways I never had before. It was clear that MC was serious about his work and wanted to bring out the best in me.

We met by phone for the Strategy Session about a week later.

1

The Game of Marketing

In our first phone meeting MC asked me all about my business, my current situation, my goals and challenges. He also asked follow-up questions to my answers in the questionnaire. After this conversation I felt he knew me better than most of my friends. I never felt he was trying to *sell* me on his services but to determine if I was serious about turning around my business and if there was a good match. When the questions were done, MC told me that he thought he could help me and proceeded to explain how he worked with his clients.

Starting to Work with MC

We would meet for a year – about twice a month, both in-person and by phone, in training and coaching sessions. In those meetings he'd explain how 'the game of marketing' as he put it, worked, and help me build the skills to play this game effectively. He told me he'd also give me things to listen to and read, and specific assignments to do between sessions.

He promised me I'd see measurable results in the following five areas

1. Development of higher-end services and programs that produce a measurable result for my clients.

2. A more powerful marketing message that got more attention and interest from prospective clients.

3. Getting my name and message out to more of my ideal clients who needed my professional services.

4. More appointments with qualified prospects and converting a larger

percentage of them into paying clients.

5. Generating more referrals and word-of-mouth business from existing clients and associates.

6. A shift my marketing mindset from one that resists marketing to one that embraces marketing.

“What you don’t yet appreciate,” said MC, “Is that learning and applying these six things in your marketing doesn’t give you an incremental increase in your business, it gives you an exponential increase. This will be very clear as we work together.

He made a point of explaining the things I would need to do to succeed and asked if I’d be able to commit to those things. This included being on time for meetings, doing the assignments he’d give me, and always asking for assistance anytime I got stuck.

When we talked price, I experienced some sticker shock; his fee was a lot more than I expected. But when I looked at where I was now and how things could be if I started to consistently attract my ideal clients, I calculated that just by landing one or two new clients I’d more than pay for his services.

We agreed on a regular meeting time and he gave me some preparation work to do before the first meeting. I was experiencing a mix of emotions – excitement about what I could get out of working with MC and some fear that I might not succeed at growing my business. He had asked me to make a commitment, not so much to him but to myself. He explained why commitment was important.

“Everything you’ve done up to this point to market your professional services has been marginally successful, because most of what you’ve done has been wrong. For this reason, it takes time to change, time to get rid of old habits and form new ones. This is hard work, and for hard work you need a high level of commitment and intention. I will do everything possible to give you the information and support you need, but ultimately it’s up to you. Are you willing to make that commitment?"

Despite my hesitations and fears, I told him I was ready to do what was necessary and we set up a time for our first marketing coaching session a few days later.

We met in his home office about 30 minutes from my home up a very long winding hill. His comfortable office was full of books on business and marketing and had a view of redwood trees and a small river in his back yard. Jazz was playing in the background when I arrived.

MC was of average height and build and wasn't quite as I'd pictured him. Billed as a "genius marketing guru," he was someone you'd probably pass on the street without noticing him. He was dressed casually in jeans and an open-collar shirt. He had a warm smile, eyes that twinkled and a firm handshake.

"Welcome RJ. Have a seat. I've really been looking forward to meeting with you." He didn't waste much time in small talk. "In this first session I'll be outlining the structure of my marketing system. If you're ready, let's get started. We have about ninety minutes."

Marketing is a Game

"Marketing is a game," he began. "The purpose of the game is to turn strangers into prospects, buyers, and clients. Marketing Ball is a model to help you understand this game and play it effectively. In baseball, there are four main activities: throwing, catching, hitting and running. But without a structure and rules there is no game. If you want to play successfully, you must know not just *how* to throw, catch, hit and run but *when* to throw, catch, hit and run.

"This Marketing Ball model is the key to your marketing success as a professional service business owner. Once you understand this model, many of the mysteries of marketing will disappear forever. This model is the foundation for all your marketing and we'll come back to it over and over again in our sessions."

Then he proceeded to explain the origins of Marketing Ball.

Origins of Marketing Ball

“Many years ago I was meeting with a client helping him with his marketing,” MC told me, “and we were talking about a particular prospect he was attempting to turn into a client. As usual, I was drawing diagrams on a piece of paper as I worked with him. The diagram was a baseball diamond.

“At one point I said, ‘Well, now you've got this person to first base…’ Then he asked, ‘What's first base?’ Of course, I was just making this up as I went along. That’s how it is sometimes as a consultant or coach!

“And I answered, ‘Well, first base is where you've gotten his attention and interest. This is where you’ve communicated to him in such as way that he’s interested in what you have to offer and he wants to know more.’”

“‘OK,’ he replied, ‘then what is second base and how do I get him there?’ After a little head scratching, I said, ‘Second base is where you have an appointment with your prospect. This is where he’s willing to explore working with you. But before you get to second base, you need to develop more of a relationship, building trust and credibility.’

“Over the following months and years I worked at tweaking this Marketing Ball model until I arrived at what I think is the most accurate model or process of how prospects ultimately turn into clients. I’ve taught it to thousands in workshops and other programs and tested it out with hundreds of clients who have applied it to their professional practices with great success.

“This model works particularly well for professional service businesses such as consultants, coaches, trainers, speakers, financial, employment, and legal professionals. It’s the perfect model for any business owner who wants to attract ‘clients’ as opposed to customers. It can be used with one-person businesses, larger professional firms, and in some cases, large corporations who are offering complex and expensive services to other businesses.

"The Marketing Ball Model is powerful, because once you understand it you can use it to solve virtually any marketing challenge. By studying the model and where your prospects are in the game you can know what to do next to move them around the bases until they become paying clients.

"I like to say it's the Rosetta Stone of professional service business marketing. It's the key that unlocks the hidden code of attracting clients.

"Nevertheless, a model, process or system is only as good as the application. The model will not do your marketing for you. It will only give you the structure and the direction. Just as with baseball, the game that Marketing Ball is loosely based on, it takes talent, knowledge, skills and practice to become a champion. If you master Marketing Ball, you will get to play in the big leagues by dramatically increasing both the number and quality of the clients you attract.

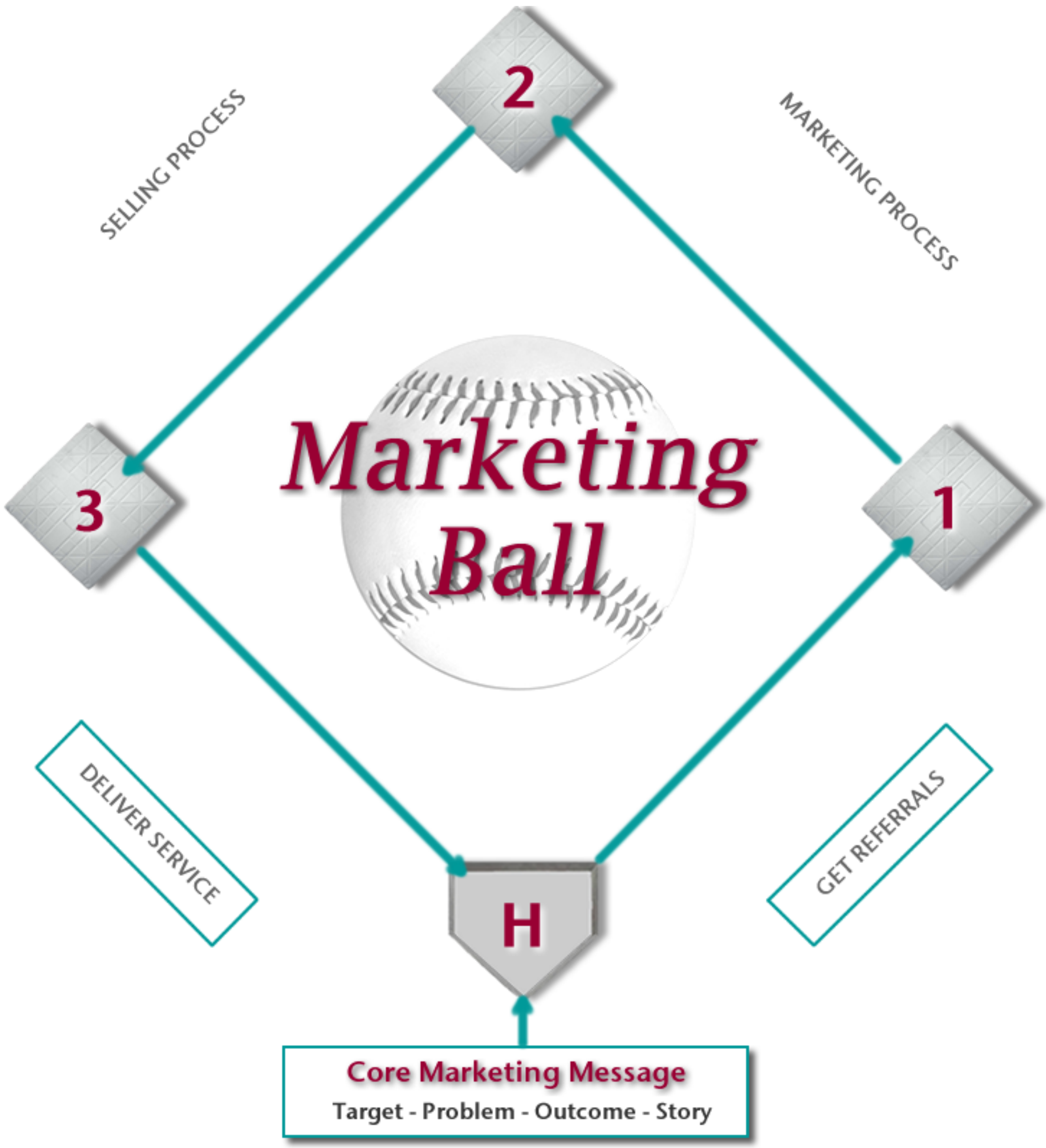
"Do I have to understand baseball to understand Marketing Ball?" I asked. Although I knew the fundamentals of baseball, I was hardly an expert. But MC reassured me.

"Not at all RJ. This is just a model that helps to explain the process. The good news is that the basics of Marketing Ball are not complex. Any intelligent professional can learn to play this game to attract more clients on a consistent basis. Even if you make mistakes along the way (and you will), you'll get better the more you play. After awhile, the game of Marketing Ball will become second nature to you. Attracting new clients will no longer be a mystery or a struggle. It will be fun because you'll know how to both play and win.

"Let me show you the Marketing Ball Diagram," he said as he handed me a printed copy.

"On the Marketing Ball diagram you see what looks like a baseball diamond. The object of the game is to move a prospect around the bases until you've 'scored' a new client. To do this successfully, you need to stay on the baselines and touch each of the bases as you go. You cannot skip bases; there are no

Marketing Ball Diagram



shortcuts. However, you can often go around the bases very quickly. It may take a matter of hours to convert a prospect into a client. Or it may take months or even years. As we'll see, it depends on the service you're offering, the market conditions, how well the prospect is qualified, and your skill at playing Marketing Ball.

"Some of these variables you have control over; some you don't. One of the most important variables in Marketing Ball is what you communicate to your prospects about your services. We'll be talking about this later in this session."

Home Plate

"The first marketing work you need to do, even before you step up to home plate to connect with a prospect, is to create what I call a Core Marketing Message (CMM). Your CMM consists of five simple but powerful elements:

1. **Your ideal target clients.** You must define who the best clients are for your services.

2. **Your clients' problems, issues or challenges.** Why do your clients need your services in the first place? What's missing for them?

3. **Your promised outcomes.** What exactly will your clients get if they retain your services? How will they benefit?

4. **Your difference or uniqueness.** What makes you stand out?

5. **Stories or proof.** Who has used your services and what results did they get? Stories create trust and credibility.

"This message is the foundation of your marketing. And when you've clearly articulated this message you're then ready to turn those messages into specific marketing communications.

"We'll work on this message soon. The next part of your preparation for marketing is developing some marketing materials or what I call 'Marketing Currency.' This includes service descriptions, reports, and website content. When you have your message and your materials in place you're ready to play the game of Marketing Ball."

First Base

"Once you have your marketing message and materials, you step up to home plate." MC pointed to the bases on the diagram as he talked. "Your first big aim or objective is to get to first base. First base is when you have the attention and interest of a prospect. Write that down on the diagram by first base: 'Get the attention and interest of the prospect.' You get to first base by communicating your marketing message. You might communicate it verbally, one-to-one with another person, and you might also communicate it through the home page of your website or through the title of an article or any other marketing materials.

"You might say any initial communication to a prospect is a 'hit' and anytime that hit connects, it moves the prospect to first base. Of course, if that communication does not result in a hit, if it doesn't connect with the prospect, they do not move to first. Then you have to try again, perhaps with a different, more effective message.

"You know you're on first base if the prospect *responds* in a positive way with some interest. The generic response you're looking for is: 'Tell me more.' Or even better, 'That's for me, tell me more!'

"By the way, here's what's *not* going to happen when you deliver a marketing message: Nobody's going to say, 'Oh-my-gosh, you do *that?* It must be my lucky day! I have an extra $75,000 sitting around, can you start working with me today?'"

I laughed as MC acted this out along with exaggerated facial expressions and voice. "Yeah, I think I know what you mean," I said. "People do ratchet their expectations up a little high when they use their marketing message, me for instance!"

"Exactly," said MC, "Everyone wants a home run when they use a marketing message. It ain't gonna happen. A base hit gets you mild interest in your services. But that's enough to set you up to head toward second base."

Second Base

"Once you're on first base, the objective is to move the prospect to second base. Second base is when the prospect is ready to explore working with you. So you want to write, 'Ready to explore working with you,' at second base on the diagram.

"The process of moving a prospect from first base to second base is usually the most complex part of Marketing Ball. There are several in-between steps you need to take to get to second base. And, as I said, it can often take a long time to get there – days, weeks, or months. Unlike baseball, where you may 'steal second base," in Marketing Ball this is usually a slow, deliberate multi-step process. You'll be learning about these steps in great depth later on.

"Again, you only know you're on second base by what the prospect does. If they want to meet with you to find out if your service can help them, you are solidly on second base. However, just a meeting with a prospect, as we'll discover later, doesn't necessarily mean you are yet on second base."

"Second base is where the marketing process ends and the selling process begins. You might say the whole purpose of marketing is to get a prospect onto second base. And the purpose of the selling process is to convert a prospect into a paying client."

Third Base

"Once you're on second base, the selling process of Marketing Ball begins. And your objective is to move the prospect from second to third base. You're on third base when the prospect is ready to buy your services, when they are ready and willing to start working with you. So write in 'Want to work with you' next to third base on the diagram.

"The selling process is a multi-step conversation with a prospective client that includes learning more about them, presenting or explaining your services, and closing the sale. This process can take from an hour or two in one meeting to several hours over many meetings. Later on, we'll be exploring and even practicing this process until you've mastered it.

"You're making solid progress if you get a prospect to third base. But you still don't have a client until they are on fourth base or back to home."

Fourth Base (Home)

"Moving from third to home is where you confirm your agreement to work together. This often includes a proposal. The final step is when a prospect has put their money where their mouth is. They have started to work with you and they have paid your fee (and the check has cleared the bank!). Finally, write in 'Score new client' next to home at the bottom of the diagram. Only when you're on fourth base can you say that your marketing and selling efforts have been successful with that particular prospect. And that's what it means to win at Marketing Ball.

"Before we continue, are there any questions about Marketing Ball so far?"

Yes," I said, "I get the concept of Marketing Ball. I love that it makes the whole process so systematic. I think I understand what each of the bases means, but I'm not too clear about all the things that I'll need to do between home and first, between first and second, etc."

"Don't worry about that," said MC, "We'll be coving those things in great depth as we work together. For now, all you need to understand are the basics of the game. As we go, I'll be teaching you each of the skills required to move your prospects successfully around the bases.

"Next, I want to fill you in on a few more things about Marketing Ball."

Errors

"An error in baseball is when you miss catching the ball, or fail to touch a base as you run around the field. If you make an error in baseball, it can affect the outcome of the game. The same is true in Marketing Ball.

“There are plenty of opportunities to make errors. The most common error in Marketing Ball is skipping bases, such as trying to get to second base before you touch first base. The other big error is thinking you have a sale when you have merely gotten to first, second or third base. As in baseball, it only counts when you get all the way around the bases and score a run. So to win at Marketing Ball, you need to know where you are in the game at all times and know what you need to do next to move the prospect to the next step and ultimately win a new client.

“Prospects can sometimes go around the bases with little effort on our part. This often happens if they come to you as a result of a strong referral. In that case they are ‘pre-sold.’ But more often than not, you need to make focused efforts at each stage of the Marketing Ball Game. I’ve heard many a professional declare they had won a new client, just because they had set up an appointment with a prospect. They were usually wrong.

“Fooling yourself into thinking you have a client and then not continuing to make the required effort to win that client is called ‘dropping the ball.’ And, as we’ll see throughout our work together, there are many opportunities to do this! By learning, and ultimately mastering the skills of the Marketing Ball Game, you’ll drop the ball a whole lot less and keep things moving until you make it home with a client ready and willing to work with you.

The Dugout

“Now, a couple more things on the Marketing Ball diagram. Once you've gone around the bases and scored a run, and secured a client, then you deliver the services to the client. You might call this the dugout (lower left of the diagram). We often don’t think of delivering our services as part of marketing. But if you really think about it, it’s one of the most important aspects of marketing.

“Providing excellent service to your clients results in great word-of-mouth.

And word-of-mouth is the life-blood of any business. I don't care how good all your other marketing efforts are, with great marketing and poor service you will completely undermine your business. Your friend that introduced you to me told me that this was your greatest strength, and that's the main reason I decided to speak with you. I can't help those who offer substandard services."

Referrals

"Ultimately, great service and the subsequent word-of-mouth results in referrals to your business (see rectangle on lower right of diagram). Referrals can actually substitute for all the marketing efforts between home and first base. In other words, a referral can get you solidly on first base where you have the attention and interest of a prospect who wants to know more about your services. If the referral is strong, it often paves the way to second, third, and home more quickly than without a referral.

"Now here's the interesting thing. Do you know how many people get the majority of their business through referrals and word of mouth? From talking to a whole lot of business owners, I figure it's as high as 80% to 90%. But it's extraordinarily rare that anyone has an actual marketing strategy or plan to generate referrals. They just happen. Later on you'll learn how you can intentionally create a referral plan that brings in even more clients."

Your Current Marketing Game Plan

"RJ, I've just outlined the basic rules of Marketing Ball. You take a prospect through a step-by-step process; you communicate the value of your services and get the prospect onto first base by getting their attention. Then you communicate more value and get the prospect onto second base where they are ready to explore working with you. Next you learn more about the needs of your prospect and communicate even more value (in the selling process) until they are ready to buy. Finally, you come to an agreement on the value they will get and consummate the sale.

"But is that how your marketing process works? Yes, when it works, but most of the time it doesn’t. Let’s return to the baseball analogy. As I mentioned earlier, there are four primary activities in baseball: You throw the ball, you catch the ball, you hit the ball and you run.

“Now imagine a baseball team that can do those four things very well. They can throw, catch, hit and run. But they know nothing about baseball, nothing about the rules or the structure of the game. What is that baseball game going to look like?”

I answered, “Sounds like chaos to me.”

“Exactly. It will look like your current business does. You know some of the basics. You can talk to people, give a presentation, send out an email, and perhaps write an article. But if you engage in these activities randomly, there is no real game, no predictable process for attracting clients. As a result, business will also come to you randomly and very inconsistently.”

The Prayer Marketing Strategy

MC was on a roll as he delivered his final point: “Here is the marketing plan for most professional service businesses: ‘I'll do the best job I possibly can for my clients and then I'll go home every night and pray for referrals.’ Is that your marketing plan? If so, I hope you’re beginning to see that by playing Marketing Ball, prayer doesn’t need to be a cornerstone of your marketing!

“With Marketing Ball, you’ll finally have a proven system to attract all the clients you want. You can play this game and win over and over again. You can create marketing campaigns and strategies that bring you many, many clients and earn you hundreds of thousands of dollars in a short period of time if you learn how to play this game well.”

With this, MC wrapped up his explanation of Marketing Ball and asked if I had any questions.

“I think I get the overall picture,” I said. “Essentially what you’re laying out for me is a step-by-step process. And you’re right about what you say about randomness. That's an exact picture of what I do. I don't follow any kind of a process. As you say, I throw, catch, hit and run, but not much else. I'm not playing a game, and as a result I'm not getting anywhere. But the other aspect of this are the Marketing Ball skills, knowing *how* to throw, catch, hit and run in the most effective ways. I know I have some skills but I'm certainly not very good at many of them."

"That's why we're working for a year," said MC. "I can teach you these concepts in a few hours. But putting them into action and getting good at them takes time and hard work like anything else. But when you understand the game and the rules, learning these skills is a lot easier."

"Are you ready to learn one of those skills now?"

"Absolutely," I said, with enthusiasm. "I can't wait to get started!"

2

Marketing Messages

"RJ, The most important thing in marketing, not just for a professional like you, but for any business, is what I call your 'Core Marketing Message.' This message communicates your value to your prospective clients in a way that generates attention, interest and response. The trouble is, most business owners either don't have a Core Marketing Message, let's call it the CMM, or they have one that has no possibility of getting anyone's attention, or interest, let alone response.

"Your Core Marketing Message consists of four simple elements:

1. A statement of who your Ideal Clients are.
2. A statement of the client's main Problem or Challenge
3. A statement of the Ultimate Outcome that you deliver to your clients
4. A statement of how you are Different or Unique
5. A Story that clearly illustrates all of the above four.

Ideal Clients

"Let me explain these in more depth. First, your ideal clients. Who are they exactly, not generally? Are they business people or individuals? Do they work in small or large companies? What industry, location, etc. What is their position? What are they like personally, what are they interested in? In other words, you should have a very specific 'Personality Profile' of your ideal clients with as many details as possible. How can you expect to attract the clients you want, if you don't know who they are, where they are, and what their needs are? In most cases, this is handled completely superficially. And if it's superficial, you can't get a visceral experience of who that ideal client really is."

Client Problems

"Next, what is missing for your ideal clients? That is, why do they need you? What are their problems, pains and predicaments? What would get their attention if you spoke about it? What words would prove that you knew what your clients were going through? What would make them think, 'Oh, he understands me, he's been there'? Unless you can communicate in this way, your prospects won't pay you much attention and if you have no attention, you can't get any further than that."

Ultimate Outcome

"Articulating an Ultimate Outcome is the next part of your CMM. You might say that this is the 'mirror image' of your statement of what is missing. So if a prospect is missing the ability to get her managers to become leaders, then the outcome you deliver must help those managers to become leaders. But an Ultimate Outcome needs to be more than that. An Ultimate Outcome can't be boring or pedestrian. It needs to have teeth, it needs to be exciting and compelling. So your Ultimate Outcome in this case might be: 'Our services guarantee to transform ordinary mangers into dynamic leaders that drive growth, and profitability.'"

"But isn't that a little over the top?" I said. "Is someone really going to believe that?"

"If you can actually deliver on your ultimate outcome, it will come across as authentic, not as hype. No, you don't want to make promises you can't keep, but the whole point is that your Ultimate Outcome needs to be a promise, not empty rhetoric. The next part of your message helps you stand out in the minds of your prospects. It's your difference or uniqueness."

Difference/Uniqueness

"This is a little harder for Independent Professional Marketing than for product marketing because so many professional service businesses offer similar things. Consulting, coaching, and training; what makes you different? And you want your prospective clients to understand not just what makes you different, but why it's important to them. Your difference could include one or more of the following: a unique model, such as Marketing Ball; your experience and proven results, your marketing niche, or target market; your approach to working with clients. This difference is what will stick in the minds of your prospects more than anything else. So when someone asks how you're different, you had better have a good answer! The weak answer, 'We do better work than our competitors' will not cut it. However, 'our proprietary model produces results in half the time' (as long as you can prove it) will get the attention you're looking for."

"All these four parts of your CMM are essential, but conceptual; they're just ideas. But prospects want more than ideas, they want proof. And for most people, an actual story of a client's success is the kind of proof they are looking for."

Stories

"So let's take the first four components of your CMM and put them into a story. A story, by the way, that is completely true. Here's an example from one of my clients:

> "Recently a CEO in the smart phone industry, came to me because she was really struggling with her managers. She wanted them to take on more responsibility, instead of waiting for a superior to give them directions. In short, she wanted leaders who could grow the company. And despite her best efforts with training, this wasn't happening. They brought me in because of my reputation for results in this area, and I worked with her managers for several months to develop the leadership skills she wanted. Nine months later her new leaders are taking the

initiative to drive growth and profits to new levels. They just had their best quarter ever and new and innovative products will be launched this fall."

"Before my client developed this story he was talking all about his processes, his background, and his 'leading-edge leadership development methodologies.' He had actually been very successful with several clients, but his CMM and story were getting little attention and interest. Nobody was sure what they would get if they worked with him. This and other stories made that crystal clear. By the way, he increased his income last year by a third while decreasing his workload by 25%."

As I listened to MC's sample story that his client had used, I realized that MC had also told a success story about his client. And he was right; both stories really got my attention and interest. I started to get more excited about what might happen if I followed his instructions. This might not only work, it might actually be fun!

The First Assignment

"So your first assignment is to develop your own CMM. Write it out completely and send it to me: Your ideal client, the client's main problem or challenge, the ultimate outcome, your difference or uniqueness, and a story that incorporates all four. Let me give you a chart to fill out that will help you with this assignment[1].

And don't do this 'just anyhow,' RJ, the way most people do things," he emphasized. "That won't get you the results you want. Don't send me anything until it's your 3rd draft. Think this through, practice it out loud, and imagine the reaction of the listener. Marketing is a game and the only way to play it is to win."

MC's instructions really resonated with me. He was serious about this and

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[1] Throughout the book there are charts, worksheets, etc that MC gives RJ. These can be found at the end of the book and downloaded from the web.

expected me to be serious as well. And the fact that I was paying a premium price for these services also motivated me to do everything possible to master the ideas I was learning.

"By the way," MC said in closing, "If you happen to connect with someone between now and the time we meet again, try out your CMM and success story. See if you notice a difference in the response."

The two weeks between meetings with MC flew by quickly. I was currently working on a few projects with clients along with the ordinary distractions of a self-employed professional. I noticed myself procrastinating for several days before I started my assignment. Thoughts of how I would never be a good marketer and that the CMM for my business would be too complex, kept circling around in my head preventing me from doing my assignment. But ultimately I remembered my commitment and the fee I was paying and got down to work.

Developing My CMM

Several hours and many drafts later I had all the pieces of my CMM. In writing past marketing materials I realized that I had written mostly about me, about what I did, what things I knew, what theories I applied. But the CMM was quite different. It was as if it was written in a different language. And this language was about what my clients *got* from working with me, not about what I *did,* not about my process.

I considered myself a business consultant and coach who worked with small to medium sized businesses in the areas of productivity, communication and teamwork. This also included some training in these areas. But I had never really zeroed in on an ideal client, usually just taking what work came up from whomever offered it to me. Speaking about problems, outcomes and uniqueness, let alone using stories in my marketing, was unfamiliar territory.

What was an ideal client? I guessed it would be a client that I liked and respected and who listened to me and took my advice. An ideal client didn't quibble about fees, paid me on time, and made their best effort to implement what they learned. However, most of my clients were not very long term, which meant that I rarely had the time or budget to do everything possible to make a big impact.

I then remembered a client I had the previous year who was really committed to change. You might say that this client had sold me on working with him in more depth. I had a chance to use all my tools and skills, and ended up helping this client make some major changes over a nine-month period. This seemed like an ideal client for me. I certainly would like to get more like him. I wrote up a detailed profile of this ideal client and felt that attracting more clients like him was a worthwhile pursuit.

I remembered back on the issues and problems experienced by this client before I started working with him. His business was growing but things were in chaos. Nobody knew what they needed to do to keep things working. Despite lots of work coming in, productivity and communication were on the rocks, and teamwork was practically non-existent. My client was overwhelmed but determined. He knew that if he didn't get control of the situation, things were likely to fall apart. I was a little intimidated at the time, after all, it would take a lot of work to set things right. And although I'd never done a project at that level before, I knew I had the skills to make a difference.

In part two of the assignment, I made a long list of all the problems, pain and predicaments (as MC had said) that my ideal clients might be experiencing. I narrowed it down to one key idea: "I work with businesses who are experiencing loss of control that is threatening the success of their businesses."

My ultimate outcome was harder. I kept coming back to my habit of talking about my process and methodology: "I work to optimize productivity, communication and teamwork through an integrated approach of interactive coaching, consulting and training."

When I looked at this through MC's ultimate outcome model it sounded ridiculous. No wonder I got those blank looks every time I talked about my business. It makes sense to me but sounds like gobbledygook to everyone else! There's nothing about what the client *gets* in that statement, nothing they can really relate to.

If the ultimate outcome looks like the mirror image of the problem and also has some teeth, and a clear promise, what would that sound like? After many iterations, this is what I emerged with:

"My clients take back control of their companies and start growing in a way that gives them great results with much less stress."

Thinking of my ideal client from last year, this is exactly what they got. And they were not only satisfied, but completely delighted that we had been able to accomplish this result. I even remember the client introducing me to a business associate with these words: "Meet my business guru. He helped make my company work again."

And I guess it's not a coincidence that his associate also hired me. Funny thing, my clients tend to talk about me more persuasively than I do! They talk in results-oriented language while I talk in abstract concepts.

When it came to defining my difference or uniqueness I was completely lost. Everything I came up with seemed so trite. I didn't have a truly unique model, I worked in several industries, I couldn't promise over-the-top results, and although I had a lot of experience, it didn't make me unique. I decided to bring this up with MC later and moved on to stories.

Compared to defining my uniqueness, my story was relatively easy to write:

> "I worked with a small manufacturing company last year who had developed some very successful products and was growing fast. The problem was that with this growth things were getting out of control. Everything was in crisis mode, everyone was blaming everyone else about what wasn't working, and the company was in real danger of collapsing under its own weight. They brought me in to help get things under

> control and on track. I worked with them for several months to improve everything from manufacturing systems to management communication. When I was done, control had been restored, productivity and profitability were up, and the stress levels were the lowest in years. Early this year they were named 'Business of the Year' by the Chamber of Commerce."

I smiled as I remembered that award. That was a big win, but I had never used that in my marketing or even gotten a testimonial from the client to put on my website – yet another place I had dropped the ball in my marketing. It was only sometime later that I understood why I avoided taking simple marketing actions like this.

However, later in the week I had the opportunity to talk with one of my business friends and told him my CMM with an emphasis on the story, just to get his feedback. His response was encouraging.

"RJ, I didn't know you did that. I thought you just led workshops on communication in companies. But this is really interesting. Tell me more about how you got those results."

Even though my friend wasn't a potential client, I was happy that my story had connected with him so well. "This stuff works," I thought. "I wonder what MC has in store for me in our next meeting?"

3

Marketing Currency

In my next meeting with MC, I was excited. I felt that I'd come to a new level of clarity about what my business was really about. I'd had a chance to use my story a couple more times with business associates. And instead of that blank stare, people looked interested and impressed. I realized that despite being in business for three years already, virtually nobody understood what I really did for my clients. That was about to change.

"You did a great job with your CMM," said MC. You've kept it simple and yet it has impact. It has the ring of truth. I don't need to figure out what you mean; I got it immediately. Your CMM is really the core foundation of your marketing. It's the heart of all your marketing communication. So whenever you communicate about your business, you want to come back to your CMM. This can include conversations about your business, emails you send to follow up with prospects, all the written content on your website, articles and reports, even audios and videos.

"But before we move on, I noticed that you haven't yet defined your difference or uniqueness. Did you get stuck on that one?"

I explained to him how I had reached a dead-end with that. I told him I had no idea what made my business unique compared to all the other business consultants, coaches and trainers out there.

"Sometimes your difference can be one word," said MC, "and I think I know what your word is – 'Control.' You keep coming back to that concept. It's mentioned in your statement about your ideal clients, their problems, your ultimate outcome, and even your story. This word, 'control,' can and should have a central role in your marketing message, including how you are unique. So if I asked you, 'What makes your business different?' tell me how you'd answer."

It took me a few minutes to craft the statement, but this is what I came up with: "What makes me unique is that I help my clients bring control to every single aspect of their businesses. The main reason that businesses are in trouble is that they've lost control. I help them take that control back."

MC smiled, "sounds good to me," he said. "I think you nailed it. I suggest that you actually create a model with this concept of control. What does control actually mean? What's connected with it? What processes are necessary to make it happen?

"Go as deeply as possible into this. Ultimately, this concept of 'control' will make you and your business stand out and be memorable. And you'll also want to integrate this into all of the programs you create."

MC was giving me great food for thought and I started to feel excited that my CMM was becoming real, a message that could actually generate the attention and interest I needed it to. But before I could think much more about this, MC switched gears.

Marketing Syntax

"What I want to talk about today is a 'magic formula' for all your marketing communication that will make it even more effective.

The key to effective marketing communication is what I call 'Marketing Syntax.' The definition of syntax is: "The arrangement of words and phrases to create well-formed sentences in a language." In the language of marketing there is a particular syntax, and you already used it in your CMM:

1. Target Market (or ideal client)

2. Problem, Pain or Predicament

3. Solution or Outcome

4. Difference or Uniqueness

5. Story or Case Study

"Sometimes you can jump right to the story because it contains the first four parts of Marketing Syntax. It's a complete marketing communication unto itself and does the job of grabbing interest and attention and stimulating response, just as it did when you used your story with your associates.

"What Marketing Syntax does is speak to the needs and interests of your prospects very directly. Some say that it answers the question, "What's in it for me?" It's a very basic fact that people listen to that which will benefit them. Using Marketing Syntax will ensure that this happens every single time. Of course, your message won't interest everyone, only those who have a need for your service.

"Marketing Syntax should also be employed in all your written marketing materials, as I said. In marketing materials, especially descriptions of your services, you have a few more steps:

1. Target Market (or ideal client)

2. Problem, Pain or Predicament

3. Solution or Outcome

4. Difference or Uniqueness

5. Story or Case Study

6. Benefits and Advantages

7. How your Services Work

8. Call to Action.

"I also call written marketing materials 'Marketing Currency.' I call them currency because when people read them, they buy you something. They buy involvement, increased interest, more of their time and attention, and engagement in your ideas.

“It takes more than your CMM to get a new client. That’s only the first step. As soon as you have the attention and interest of a prospect, they want one thing: More Information. Good marketing currency satisfies that need and Marketing Syntax makes sure your communication has impact. We’ll be talking a lot about marketing currency in our work together, but I don’t like to get too theoretical. It’s necessary to put the principles of Marketing Syntax into action.”

The HEOB Letter

“Your next assignment is to write a *complete service description* for your company. This is something you can send to people who are interested in knowing how you work and what results you produce. This document will be the foundation of all the marketing materials you’ll write in the future. You can start with your current services and put them into a more comprehensive package. You want to package your services so that you are offering a solution, an outcome, not a process.

“When I started my marketing coaching business years ago, I didn’t understand this concept. I knew a lot about marketing strategies and communication, but it took a long time for me to grasp how important packaging my services was. So initially, I sold my services by the session. People could sign up for as many sessions as they needed. But what I finally realized is that people didn’t want to buy marketing sessions; they wanted marketing results.

“I looked at the few clients who had practically forced me to do more sessions with them. And it was obvious that those I worked with longer received better results than those who only bought a few sessions. So I created a solution-based package of marketing services that took longer, was more in-depth and cost considerably more. I turned this all into one document and got it into the hands of every prospective client possible.

“And then a wonderful thing happened. People signed up for my more comprehensive program as easily as my previous marketing sessions. I virtually tripled my income in a month while producing much better results for my clients.

"Ultimately I named programs like this High-End, Outcome-Based (HEOB) programs. These programs were targeted to my ideal clients – the ones who were sincerely interested in doing whatever it took to grow their businesses. They paid me more and consistently got superior results. Over the years I've helped hundreds of Independent Professionals create their own HEOB Programs.

"So your assignment is to use the principles of Marketing Syntax and Marketing Currency to write your own HEOB Program into existence. I'm going to give you step-by-step guidelines for writing your HEOB Program:

1. Title of program and headline for the program. This gets the attention of your ideal clients and draws them into the text.
2. Three or four-paragraph opening, giving the context of the program and who it is for.
3. Section on the key issues or problems facing your prospective clients. Keep it to three!
4. Section on the results and outcomes they want instead of the problems they have. Include from three to six major results.
5. The name and overview of the HEOB program you are offering that will get the prospect the solution they want. Two to five paragraphs max.
6. What makes your program unique or different? Explain why your program is special and why it's an advantage.
7. A few stories or case studies of how this program has helped your clients.
8. Several key benefits of your program. Make this a few short paragraphs, not short bullet points.

9. The structure of your HEOB Program. These are all the externals and process of the program. This is the first place you talk about this in the letter.
10. Bonuses. This is optional, but in many programs you can include bonuses to increase value.
11. Is this program right for you? Give a summary of the value of the program and who will benefit most.
12. Close and call-to-action. Always offer a Strategy Session to close. This is the whole point of the letter, to take them to the next step. Without a call-to-action they will not act.

"As you see, this follows all the steps of Marketing Syntax I outlined earlier. This flow of communication keeps your readers interested, wanting to know more and continuing to read until they get to the end.

"I know this is a lot of writing," said MC. "I'll give you several samples of successful HEOB letters that you can emulate for your business. Study the guidelines, and samples and then get started."

"I have a question," I said. "Why wouldn't I just get a writer to do this for me? Wouldn't that be a lot easier and faster?" I definitely had some resistance to writing.

"It probably would, but it wouldn't produce the results I'm looking for. Marketing is not your main pursuit; your consulting, coaching and training are. I know you'd rather spend time doing that. But your ability to market your services is central to your overall success. You need to understand, practice and ultimately master the art of marketing. Mastery comes from actual practice. I want you to be able to distinguish a good marketing communication from a poor one. No other exercise in marketing is more powerful than writing. I like to say that writing is to marketing as pumping iron is to muscles. Writing builds your marketing muscles unlike anything else.

"The side benefit of doing all this writing is that you'll find you automatically become better at your verbal marketing communications. When someone asks you what you do, you'll have a better, more persuasive answer. And it's all because you spent hours thinking of those ideas and putting them down on paper. If you need to, ultimately you can hire an editor to fine tune what you've written, but you need to completely own the substance of your marketing currency."

Writing the HEOB Letter

This demand to do my own writing was quite unexpected. I had never considered myself to be a good writer and it was always a struggle to get started. But ultimately I agreed to the assignment and went to work. The guidelines for each part of the letter and the samples were a great help.

I'm rather embarrassed to say how long it took me to write the first draft of my HEOB. But I succeeded because I just took it one section at a time, compared it to the samples, and then read each part out loud until it flowed naturally. It was hardly a work of art, but it was a concise, yet comprehensive, overview of a program I named, "Take Control of Your Business." It was a one-year program, longer than any program I had sold before. But I was confident that I could carry it off successfully. It provided exactly what businesses that were out of control needed.

I didn't send it to MC until I had done the third complete draft and felt confident it was the best work I could do. In our next meeting MC critiqued my work in an unexpected way. He didn't give me feedback on my writing, but quizzed me on my program as if he was my prospective client. The questions he asked included:

What are the main benefits of your program?

What actual results can I expect if I do this program?

What measurable changes will happen in my business?

Why do you do your assessments that way?

Is coaching really a necessary component of the program?

What guarantees can you give me?

And on and on relentlessly. He wrote down notes to all my answers.

After about 45 minutes of questioning, MC looked up from his notes and asked me one more question: “How do you feel you did? How confident do you actually feel about this program and your ability to produce real results with your clients?”

I answered, “Very confident… I think…” as we both laughed.

“You actually did quite well,” said MC, “considering this was your very first attempt at creating an HEOB service. To me it sounds viable and shows that you know what you’re talking about. Let me give you the notes I took; look them over and give the letter even more thought. The questions I asked might not be asked by every prospect you meet with, but I assure you, they are thinking about all of them. And unless you are 100% confident that you can answer these questions and have a solution for your prospects, they will hesitate in moving forward.”

“Now do you see why writing this was so important?”

I nodded.

“Great, now let’s get into more writing.”

4

Marketing Reports

"OK," he said, "we've just started. There's a lot more to write. We're going to talk about reports. A report is one of those multi-use marketing pieces that can be used in a multitude of situations. You can give someone your report after meeting them in a networking meeting. You can offer your report on your website in exchange for your visitor's name and email address. You can post your reports on various places on the Internet, and you can send reports to anyone you think might be a prospect.

A Report as a Marketing Tool

"A report is like a weapon or tool. You wouldn't go to war or to work without it!

"A report gives your prospective clients some valuable information that 'hooks' them into your world. When they read your report they'll get a sense of how you think, how you work and the value you offer. Unlike the HEOB letter, an article or report is not so much a promotion piece, it's an information piece. And information is the first thing people want once you grab their attention and interest. People will rarely pay you for your expertise until you give them a free sample of that expertise."

MC proceeded to give me an outline of how to write an effective report. He also told me how a report was different than an article or a white paper.

"An article is a shorter written piece on one specific topic," he told me. "It offers focused information on just one thing. For instance, in your business you could write about various management skills such as running meetings effectively or managing conflict. A white paper, on the other hand, is a longer more in-depth piece, often requiring some research. And a report, which we'll be focusing on today, gives a broader overview, containing the core issues you work on with your clients. An article is good for an email newsletter, a white paper is more appropriate if you've developed a new technology or methodology, and a report is a perfect introduction to your services.

"As with everything I'll teach you about marketing, I'll break the writing of a report into its component parts and also give you some examples. A report starts with an introduction, proceeds to discuss several ideas or principles and wraps up with a conclusion. I feel the best reports also include some brief case studies. I think the best way to do this is to show you some examples."

MC had printed out a number of reports for me to look at. "These are from some of my clients who wrote reports just as you're about to."

"Here's the opening of a report by a negotiation consultant, J.N."

10 Contract Negotiation Mistakes That Can Sink Success

When negotiators gets mediocre results (which is MOST of the time!), their boss blames the economy, the weather, or the other company, when the real problem is that no one took the negotiation process seriously enough to systematically prepare for it. Some people take a stab at preparing — one client showed me her three-ring binder with some planning tools in it — but it's no substitute for the real preparation that goes into a contract negotiation.

"And here's another from a business coach, A.S."

8 Mistakes That Keep Change Agents from Making a Difference

Whether you are an entrepreneur, leader, consultant or coach, the road to becoming an effective agent of change is littered with misunderstandings and mistakes that will stop you unless you learn how to avoid them.

> To transmit your vision, you must become an effective vehicle of the change you envision. You'll need to open up a clear pathway reaching from your deepest inspiration to the finest details of implementation.
>
> By understanding and anticipating the most common mistakes and misunderstandings, you will be able to deepen your capacity for having a transformative influence on clients and colleagues.

"Both of these report titles are based on mistakes," I remarked. "Is that a coincidence?"

"Not at all," said MC. "I call this the '10 mistakes report approach.' I'll show you the copy for some of these mistakes in a moment. This isn't the only way to write a report, of course, but it's an excellent format for novice writers. It practically writes itself. All you do is write down anywhere from five to ten mistakes your clients make and then explain what those mistakes are and how to correct them. This goes back to Marketing Syntax. You lead with problems or mistakes that tend to be more attention-getting than solutions.

"Compare these titles, for instance: '10 Ways to Improve Your Marketing' or '10 Ways Your Marketing is Undermining Your Business.' Which is most compelling and why?"

"I'd have to say the second one. It's much more intriguing. I want to know how marketing might be killing my business. It's more provocative, whereas the first one is kind of bland and gives me the sense that I'll have to work on something. It doesn't pull me in and make me want to read it."

"Exactly," said MC. "Titles and headlines are a whole study unto themselves. So not only is a 'problem or mistakes-oriented headline' more attention-getting, the content of the report keeps the prospect reading to see if he or she is making that mistake. Remember, the challenge with any marketing communication is to get someone to both start reading and continue reading to the end. This format increases the chances that this will happen. Now let's look at a few of the problems outlined in these reports.

"This first one is from leadership consultant, A.R."

3rd Mistake – Breaking Promises

Many people, including leaders, operate from the principle, "results can mean no results plus a good excuse." In other words, they intend to do what they say they'll do, but allow rationalizations to get in the way. This behavior undermines trust, damages relationships, and creates roadblocks to getting things done.

When leaders and coworkers keep their promises, they get clear, coordinated actions, stronger relationships and visible results. In all domains of life, the ability to be accountable and hold others accountable is a key driver of both results and relationships.

In an engagement with a large distribution company, we helped the CEO and his team completely transform their skills in this area. Their meetings had always been lots of talking and little action, and often lasted well beyond the agreed-upon end time. With our help, they realized a good meeting is about clear, coordinated actions, where people make promises on actions they will take, and then keep those promises. The CEO and senior team quickly began to hold themselves and others accountable. Idle talking and broken promises became a thing of the past. The company's earnings went from breakeven three years running to a 20% return on sales within one year.

"This next one is from I.G., a consultant specializing in helping physicians be more productive and less stressed."

Mistake #2 – Doctors think they are always efficient

Physicians are highly-strung people who rarely like anyone to tell them how to run their practice, let alone make suggestions on how to increase efficiency.

At the same time, many struggle with time and performance issues. The reason is that many physicians are caught up in the doingness without ever reflecting whether certain processes could be streamlined, delegated or simplified, resulting in wasted hours and mounting frustrations.

> An ob/gyn I worked with lost about 14 minutes every time she had to schedule a patient for surgery: 7 minutes to walk the patient through the hallways to the administrative office, 7 minutes to walk back. It had never occurred to her to delegate this task to a staffer. Such a small change made a huge difference in her ability to leverage her time. She put up with this inefficient habit for so long that she never thought a solution was possible. Just imagine how much money your hospital could save if all your physicians worked on just one area of efficiency!

As I read these two sections I noticed they not only talked about the mistake, but gave a suggestion about how to correct that mistake and included an actual example of how making that change made a difference to the client. They both use Marketing Syntax. Each mistake is also an opportunity to promote the professional's actual expertise. Clever.

MC continued, "A report like this gives the reader some real value while helping them understand how you work with your clients. When you read a report like this, it's natural to start thinking: 'Hmm, maybe this person could help me as well.' And this is exactly why you want to offer a report to the visitors of your website. Without any heavy-handed hype, your visitor is now thinking about you favorably and is open to receiving more information from you. And now that you have their name and email address, it's easy to provide that information.

The Report Assignment

"So your next assignment is to write a '10 Mistakes Report.' The way to start is by writing down every mistake your clients make. Remember, these are all the things they hire you for, the things you help them change. And instead of talking about abstract concepts, you're talking real-world. Make a long list – every mistake you can think of. Then pare it down to a maximum of 10 mistakes that every client can immediately relate to. Then follow the examples I've given you to write your report. You'll find it easier than you think."

MC had a way of breaking things down into simple, even obvious steps. I could see why most of my writing had been so ineffective up to this point. I was using an academic style, arguing theoretical principles that were hard for an actual client to relate to but very little about what the prospect would get from using my services.

As soon as I got back to my office, I started on the report. The title I came up with was, "10 Ways Your Business is Out of Control." This was definitely a sore point for my clients. It seemed that the harder they worked, the more they lost control. And this is where my consulting and coaching had made such a difference. And of course, this report dovetailed into my HEOB Program, "Take Control of Your Business." The program was the solution I offered to my clients, and the report was the information that would get them interested in knowing more about this service.

The report was much easier to write than the HEOB Letter. It practically wrote itself, as MC said. Probably the hardest part was narrowing it down to just 10 mistakes. I consolidated a few of the mistakes and emerged with the mistakes my clients made the most often and cost them the most money. Again, I completed three drafts before sending it to MC. I wondered how he'd give me feedback on the report as compared to the HEOB letter. Would he rake me over the coals again?

What he said actually surprised me.

"You've written a very good report, RJ. I found it interesting and easily read it to the end without getting bored. I thought your mistakes were spot on and your stories were engaging and relevant. I think a report like this would definitely interest prospective clients for your services. But my opinion here isn't what counts. It's the actual response you get from others that matters."

The First Marketing Action Plan

"I have a task for you. I differentiate tasks from assignments in this way: An assignment is like an exercise; it's writing marketing materials, developing scripts and creating plans. All very important things. However, a task is the act of actually doing a marketing activity, an activity that has the potential to either succeed or fail.

"The task is to send both your article and your HEOB letter to some of your current and past clients, and some of your trusted associates. This is a relatively safe group of people to reach out to first. In some cases these materials might interest them, resulting in more inquiries about your services. And if nothing else, they can give you their reaction to what you've written. This is a simple marketing plan with only a few steps that can be implemented fairly quickly."

"Here are the elements of that plan:

Formatting Marketing Materials

"First take your HEOB letter and article and format them well. Let me explain what this means. Marketing materials are not just the content; it's how the content is packaged. Your materials may say the right things, but if they are hard to read, they actually push the reader away, and they won't get read. Here are some guidelines that work most of the time:

1. **Use a font and type size that's easy to read on the computer and on the written page.** For HEOB letters and reports I suggest an 11 – 12 pt. serif font such as Lucida Bright – a nice looking, very readable font. Word comes with a wide assortment of fonts. Don't get fancy here. Your formatting doesn't want to attract attention to itself.
2. **Use 1.5 line spacing.** This gives the writing room to breathe. It's easier on the eyes and less stressful to read.
3. **For the different sections of your letter and report use sub-headings.** Sub headings break up the text into smaller chunks, again making it easier to read.
4. **Don't have any paragraphs longer than 7 lines deep.** More than that and it feels like a chore to get through a paragraph. Short paragraphs of

two to four sentences are fine.

5. **Bold the first sentences in most paragraphs.** You'll never see this in a book, but in an HEOB letter, in reports, and also in web content this really makes a difference. You see, people read books differently than they read marketing materials.

"People tend to skim marketing materials to see if the content is worth reading before they commit to reading the whole piece. They'll scan a five-page letter in just a few seconds. If the first lines of every paragraph are bolded, that's what they'll read. So the information in those first sentences should give a very quick overview of the complete letter or report."

I formatted the text above to fit all of those guidelines given by MC. And he was right. It made the text much more readable.

The Direct Outreach Plan

"Now, with your materials formatted for readability, let's design an outreach plan. This is a simpler version of the more in-depth Marketing Action Plans (MAP) that we'll do later when you launch your other marketing strategies.

"Every plan needs a purpose, goals, a target market and a specific strategy. Your purpose is to get some experience in launching a simple marketing plan. Your goal is to get some specific feedback from your clients and associates, who are also your target market. Your strategy might be called a "direct outreach strategy by email."

"Now let's outline your steps in detail. We'll use a table for this:

Date	Action Item	Communication	Mindset
	1. Write HEOB letter and report. Done.	Write HEOB letter and report.	

	2. Format your HEOB letter and report for readability. To be done next.	Format letter and report.	
	3. Collect the email contacts for a dozen to twenty clients and associates.		
	4. Write an email introducing them to your materials.	Write outreach email.	
	5. Attach your HEOB letter and report to the emails and send them out.		
	6. Email and call back a few days later to get their reaction.	Write follow-up email and calling script.	
	7. Follow-up until you get feedback from at least 75% of them.	Follow-up scripting.	

"Those are all the action items in the second column in this particular MAP. Then in the third column, you'll write the specific communication for each action. Yes, there is repetition in these columns. Most items in column three are to write some materials or scripts. It makes the writing and scripting tasks clearer if they are listed in a separate column."

"And what is column four, Mindset?" I asked.

"That's the most important part of all in marketing, but we won't cover this now. Later you'll learn that it's the key to all marketing success and that marketing will never work until you understand mindsets.

"Finally, you'll make this plan even more real by putting target dates in the first column. An easy step to understand but not so easy to execute. We'll focus on that when working on more complex marketing action plans.

"Now looking at the table, we see that the HOEB article and report are already written. The next step is to write the contact email. Let me give you a rough draft right now. You can tweak this later if you like.

> Dear Janet,
>
> As a valued client, your opinion means a lot to me. And I'm writing to ask you for a favor.
>
> I've just written some new marketing materials for my business and I would really appreciate if you'd give me your take on them. What I'm looking for specifically is if these materials speak to your needs and interests.
>
> The first piece is entitled "The Take Control of Your Business Program." This program combines many of the services I've offered to my clients in the past but in a more comprehensive results-oriented way.
>
> The second piece is a report called, '10 Ways Your Business May Be Out of Control' which is just what it sounds like. It's a collection of mistakes, solutions and case studies based on clients I've worked with. I hope it will give you some useful insights.

> Again, I'd appreciate it if you took just a few minutes to read these over and then let me know what you think. I'm developing a more organized marketing plan and want to make sure these materials are on target.
>
> You can reply by email or I'll get back to you in a week or so to see what you think.
>
> Many thanks in advance.
>
> Sincerely,

"This letter is simple, straightforward and makes an unambiguous request. It asks for feedback, which is your goal. The follow-up scripting is very simple as well. If you don't get any feedback within a week, drop them an email or phone message:

> Hi, I'm just checking in with you regarding those marketing materials I sent you for some feedback. I'd like to get your reaction. Is there a time we could talk in a few days for just a few minutes? I'm available on Tuesday after 11 and on Thursday and Friday anytime after 2 pm. Please let me know if one of those times works for you, or please suggest an alternate time. By the way, I've attached the letter and report again below.

"The reason most outreach efforts don't work is that very few people are willing to send an email or leave a phone message like this. People take it personally if others don't get back to them. The truth is people are busy. They probably saw your first email, made a note to themselves to look at your materials later and then it fell between the cracks. But your follow-up message tells them that you're serious. And you actually asked for a time to talk. If they agree to a time, they'll likely open the files with your materials and give them a look.

"Part of the success in any marketing is dealing realistically with expectations. People are busy, they have other priorities, they get distracted easily, and they have short attention spans. But with friendly persistence, you can break through. However, you may have to try a number of times."

“One thing I’m a little concerned about,” I said, “is that this is just a trial run with people I already know. What would this be like if I’m contacting strangers? Wouldn’t they be even more likely to put me off?”

“Good question,” said MC. “You’re right, up to a point. But one thing I don’t recommend you do is contact strangers; mostly it’s a waste of time. You’ll be marketing to those you have an affiliation with. We’ll talk about this in depth later. Nevertheless, this task gives you some experience in the outreach and follow-up process that you’ll need when implementing other marketing activities.

“There’s one thing to keep in mind when playing Marketing Mall: It’s always your next move; the ball is always in your court. No matter how a prospect responds or doesn’t respond, it’s up to you to keep things moving forward. As soon as you expect the prospect to pick up the ball and do something, you’re in trouble. A prospect rarely does anything that you don’t initiate.

“So are you clear about what your task is and are you ready to start?”

“I guess I’m as ready as I’ll ever be!” But I felt a little sinking in my stomach as I said this. Actually reaching out to real, live people felt more challenging and scary than writing all those materials. And the admonition that winning at Marketing Ball was 100% up to me was a little intimidating.

But I wasn’t about to drop the ball now.

5

An Outreach Experiment

In the next week I followed the MAP to the letter. I formatted the letter and report for readability, and also converted them into PDF files so they looked even more professional. I gathered names of some past clients and a few close associates, sixteen in all. I sent off the emails with the materials attached and crossed my fingers.

MC had warned me that I needed to be conservative in my expectations. "Even the best marketing activities only get a small percentage of results. But that's enough to be very successful. If you follow up with this as I've taught you, my guess is that you'll ultimately get feedback from about 75% of those you contact."

It turns out that MC was right on target. I immediately got return emails from four people. Three said they'd get back to me later; one, a business associate got back to me with some feedback by email. He told me he liked the materials, that the HEOB program sounded great and that the article stuck a lot of chords. "Could I send this to some of my clients with your byline?" That was unexpected and, of course, I gave him permission.

First Responses

By the end of the first week I had gotten two more responses. One quite brief, but encouraging, and another, from a past client I'd done a lot of work for in the past, was completely unexpected:

> Thank you for sending me the materials on your new service and the report on things being out of control. I read the article first, and the part about meetings really got my attention. “He must be talking about us,” I thought. Meetings waste a huge amount of time here. Then I read your letter about the “Controlling Your Business” program and was intrigued. I don’t know if I need everything in this program, but I might need some of it. Please give me a call and we’ll talk.

It took me a few moments to realize that the materials I had sent out just to get feedback had actually generated a qualified prospect! I hadn’t felt this excited about my business in a long time. This was the first time in ages I’d gotten any real response from my marketing. But then I thought, feeling a little panicked, “What do I do now?”

I picked up the phone and called MC and told him what had happened, asking him what I should do next. Most often clients called me up, usually from a referral, and told me what service they wanted to buy. I then told them what I could do and what it cost, sometimes getting the work and sometimes not. This was different. I had the possibility of selling this prospect a much bigger program.

“Well, I’m not surprised,” said MC. “After all, your materials are very good. I thought you might get a response or two like this. Reaching out to your very warm list with this kind of approach often gets unexpected results. Let’s talk about what you need to do next.”

Follow-Up Calls

“The next step is a phone follow-up call. There are things you must do on that call and some things you must avoid. First, the things to avoid: Don’t talk much about your services or program and definitely don’t talk about your price. The funny thing is that’s exactly what he’ll want to talk about! You need to redirect the call to his needs and determine his level of interest. This isn’t really hard to do. The call might go something like this:

> "Hello, I'm getting back to you about your response to the feedback to my materials. I really appreciate that you looked at them and I'm glad that they stimulated some thinking about your business. We worked a few years ago on developing better communication skills with your managers. Can you tell me a little about what's happening in your business right now?"

"If he says something like, 'Well, can you tell me more about this program you offer and what it cost?' it's a good sign; it shows he's very interested, but you want to see how qualified he is first. A good answer is:

> "The program is pretty comprehensive and really helps you get control of your business, but the program is customized to the needs of our client. I can't tell you exactly what it would cost until I find out more about your situation. Can I ask you a few questions first?"

"Then you want to ask him a number of questions to understand his situation better. They might include the following:

- What's your key business issue right now?
- What are you most concerned about?
- What have you done to resolve these issues?
- How important is it to you to solve these issues?
- What are some of your key business opportunities?
- Are you open to getting some assistance with this?

"These kinds of questions will get your prospect thinking and talking. Ask follow-up questions and make sure you get the gist of his situation and why he may need your services. At a certain point he'll probably ask something like: "Well, do you think you can help me?" or "Do you think your program is for me?" And this is exactly how you answer that:

> "From everything you've said, it sounds like you have many issues similar to clients I've worked with in the past. What I need to do before I recommend any particular service or program is to sit down with you for

> a “Business Control Strategy Session.” This is a complimentary session that lasts about 90 minutes. In that session we’ll get more deeply into your current situation, talk about the goals for your company and also the challenges of reaching those goals. Then if I think I can help you, I’ll explain how my services work. How does that sound to you?”

“This little script has gotten hundreds and hundreds of meetings for my clients. It works almost every time if the prospect has a real need and is interested in getting help. That Strategy Session is also called a ‘selling conversation.’ In that session you have more than an even chance of converting the prospect into a paying client.”

A Change of Plans

“It looks like we’re going to have to change our lesson plan a little,” said MC. “The next thing I was going to talk to you about was your website and then go into more detail about what to do to get prospects up to first base. But it seems you’ve jumped ahead to second base already! Let’s set up another session before you actually meet with this prospect and I’ll explain exactly what to do and say in a Strategy Session.

“So make that follow-up call to the prospect and don’t forget your last task. You sill need to follow up with everyone you sent your materials to. Who knows, there may be another hot prospect lurking out there!”

Over the past few weeks my confidence about marketing had begun to grow, as had my trust in MC. It was clear that he had helped many people, just like me, take the necessary steps to attract more clients. So I wasn’t about to ignore his advice. I picked up the phone and dialed the prospect right after my call with MC. I followed his script to the letter.

And yes, he asked about the program and costs. But he was more than willing to tell me about his current situation and how my materials had motivated him to respond. It turns out that a new, big project they’d gotten had thrown the business into overdrive along with overstress. They were not meeting their targets for service to their client and things were getting out of control. When I suggested the Strategy Session, it was if I'd thrown him a life preserver. He wanted to meet as soon as possible. I set up an appointment for about two weeks later so that I'd have time to learn the ins and outs of Strategy Sessions.

During the next few days I followed up with my emails, asking to set up times to talk with more past clients. MC's stats were right on the mark. Out of 16 people contacted, 12 ultimately got back to me. The other four simply never returned my calls or told me they were too booked up to give me feedback now.

What I also noticed was a new sense of confidence. Since I had already gotten an appointment with a qualified prospect, I felt emboldened. Wasn't there also a good chance that some others on the list might be good prospects as well? It certainly wouldn't hurt to find out.

In my calls, I first asked about the materials, their reaction to them, and whether or not they spoke to their needs. I got a few good ideas for some improvements here and there that were very helpful. Then in a few cases I steered things around to questions about their business. They hadn't reached out to me like the first prospect, however I could still ask questions to find out how things were going. It wasn't too hard, as I'd worked with most of them before.

Need and Interest

I noticed that some were acting quite guarded, as if they were waiting for a pitch. Some were more open and shared their situation in some depth. I remembered something MC had said: "Look for both need *and* interest. If they have both, invite them to a Strategy Session." It was interesting. Some definitely had no need, but showed some interest. Some were very interested in what I was doing but showed no obvious need. And then there were two people who had a little of both.

The first one was a past client that I'd worked with briefly on some performance issues with one of her employees. Her business had grown and she was doing quite well, but she seemed to be perpetually dissatisfied. “I really need your help. None of my employees have a clue. What do you think I should do with this employee? Do you think we should have more or fewer meetings, and could I improve customer service?”

It felt as if she wanted free consulting by phone. “Well, that shows she has a need and seems to be very interested,” I thought, “Why not offer a Strategy Session?” I told her that I could definitely help her and offered the session, but she turned it down. She said, “Oh, I’m so busy right now, things are crazy and I’m not sure if I can afford your services, but why don’t you call me back next month and perhaps we can meet then?”

Later on I learned from MC why this prospect wasn’t so qualified after all. “Some people want solutions without any work on their part. They want instant this and instant that. And they don’t want to pay. They don’t want to sit down and plan. They are addicted to complaining. Sure, they’d like your tips over the phone but they’ll rarely implement anything you say. Luckily you didn’t set up an appointment with her. The Strategy Session would probably be just more of the same.”

The final person I talked to was different from the first or second prospect. He too had a need and was definitely interested. Some of the questions I asked resulted in deep reflection. “That’s a good question. My business really does keep me up at night. I have some issues that seem unsolvable.” Then he told me more of what was going on in his business. This prospect was different from the first who seemed to be ready to start working with me right away. I had a sense that he really needed to be heard and that nobody had listened to him in a long time.

The phone call went longer than the others but was deeper, more profound. Here was a person fighting for his life in his business and who really needed help, but it was clear that it wouldn’t work to rush him into a Strategy Session.

After about forty-five minutes of conversation, he ended up telling me how much he loved his business and employees but how hard it was in the current business climate. He sounded very discouraged.

I really couldn't think of much else to ask; I understood his situation quite well. And I also knew I could help him. However, in his questions he had not really reached out to me or asked anything about my services. There was a very long pause on the line. We both just sat in silence for about a minute (which is a very long time on the phone).

Then one simple sentence from him: "Can you help me?"

And without thinking, I said, "yes, I can." Nothing more.

"OK, how do we start?" he said.

I told him about the Strategy Session and he set up an appointment without hesitation. When I got off the phone I felt that something very special had transpired but I wasn't sure what it was. Things felt very quiet, very peaceful and a subtle feeling of joy permeated my whole body.

"Wow!" I thought. "I wonder what MC would say about this?" Later on we had a conversation about this as well.

The Magic of Listening

"You discovered the magic of listening," he said. "We all take listening for granted, but nobody really listens. Nobody tunes into others, most people don't care, they just want something. True listening is a rare gift. Yet listening is one of the biggest keys to marketing and selling success. When you forget your agendas, what you want, what you think a prospect should do, how great it would be to get the deal and just listen, something often happens that is extraordinary, both in the experience of you and the prospect.

"My guess is that you'll have a great Strategy Session with him and that he'll be a great client. But you have to keep listening!"

In our next meeting a few days later we discussed Strategy Sessions at length.

6

Strategy Sessions – Setting the Stage

My next meeting with MC seemed to be on a different level. In my first sessions I was like a sponge, soaking up everything he said. But now I felt I had been "initiated." I had passed the first threshold so-to-speak, by setting up those two Strategy Sessions. And I listened even more closely.

"It sounds like you have two very viable candidates for your services in your Marketing Ball Game. Your previous affiliation plus our simple marketing action plan got them up to second base quite quickly. By learning the Strategy Session process now, you'll be prepared to conduct successful selling conversations with any prospect, no matter where they come from. This process and skill is one of the most valuable you'll ever learn in your business. I learned it from one of my coaches years ago."

Thoughts and Feelings about Selling

"Before we start," MC said, "how do you feel about selling?"

"Good question" I said, "As I told you before, I've really avoided selling. I've been more of an order taker. I've never felt comfortable because I think of selling as manipulative and dishonest. And I've convinced myself that if someone wanted my services, they'd tell me what they needed, I'd let them know what I could do, and that would be that. When I began working with you, I really wasn't thinking about selling, only marketing. I thought that if I could market effectively then more people would automatically buy my services."

"Well, let's lay that myth to rest right now," said MC. "Selling is absolutely necessary. The thing is, your concepts about selling have nothing to do with real selling. Selling is not dishonest and manipulative, to start with. Selling is more what you experienced when you really listened to that second prospect. You might say that selling is about helping your prospects get what they really want.

"Your prospect needs help with his business. If he doesn't get it, he's in trouble. Your conversation with him opened the possibility that you might be the person who could provide that help. Notice that you didn't try to convince him of anything. Only amateur salespeople use manipulation and other tricks to make a sale. So this isn't what I'm going to teach you. Like everything else in marketing, selling is also a process. It's not a random collection of techniques. And if you master this process you can be extraordinarily successful in your business.

"Let's look at the Marketing Ball model again and put all of this into context. The first part of marketing is preparing to play the game; that's what we've been doing for the past few weeks. You've developed an attention-getting marketing message and developed some marketing currency that reflects that message. That activity got you up to home plate where you targeted an audience – some past clients. Then you got their attention and interest with your email and follow-up calls. That got you to first base. And because you already had a degree of familiarity and trust with these past clients, your follow-up conversations got two of them to second base.

"Now if you had an endless list of past clients, that might be the only marketing strategy you needed. But I don't think that's the case, right? So once you've learned the selling process, we'll be going back to home plate and developing many different strategies that will get more and more qualified prospects to second base.

"Now back to selling. I really don't want you to think about 'selling.' It has too many negative associations, as you told me yourself. Most people think of selling as 'doing something to somebody,' or 'getting someone to do what they don't want to do.' The dictionary defines selling as: *Sell: Give or hand over* *(something) in exchange for money.* But that really doesn't help you, does it? In fact, any definition or explanation of selling really doesn't tell you what you need to do."

The Strategy Session Process

"However, a step-by-step process does help. We call this process a 'Strategy Session.' This we can define and this we can practice. A Strategy Session is 'a meeting held under *favorable conditions* with a *qualified prospect* who has a *need and interest* in making a change and is *ready to explore* working with you.' Let me break this down for you even further.

a) **A meeting under favorable conditions.** A meeting in the corner of a networking gathering is not a Strategy Session. A meeting where someone only wants to know how your program works is not a Strategy Session. A meeting with a lot of interruptions is not a Strategy Session. So, only under favorable conditions will a Strategy Session be successful. This will usually be in your office, the prospect's office, over the phone, or a quiet place where there will be no interruptions for at least 90 minutes.

b) **A qualified prospect with a need and interest in making a change.** A Strategy Session can only convert a prospect into a client if they sincerely want change in their lives and/or business. You need to determine this before you set up a Strategy Session.

c) **Ready to explore working with you.** A Strategy Session is a turning point, not a casual conversation. The prospect needs to engage in this session, receptive to the possibility that they will hire you.

"I believe the two Strategy Sessions you set up with your past clients meet all those requirements. If so, that's all you can ask. Again, you might say that the whole purpose of marketing is to get prospects who meet these three criteria into Strategy Sessions with you.

"Now let's outline the step-by-step process. I've divided it into four parts:

1. Setting the Stage for the Strategy Session

This is everything you do at the beginning of the session to make sure the prospect understands what the Strategy Session is about, what will happen and what is required of them during the session.

2. The Interview, or Questions and Answers

The interview comprises the majority of the Strategy Session and includes questions in three distinct areas: a) the prospect's current situation, b) the prospect's goals and vision, c) the prospect's challenges in reaching their goals.

3. The Presentation of your Services

This is where you explain how your services can help your prospects overcome their challenges and reach their goals. It includes an explanation of the outcomes you deliver to your clients, plus the structure of your services.

4. The Close

This is where you get a commitment from the prospect to work with you and, very importantly, to pay you. When you have successfully completed a Strategy Session, your prospect will want to work with you. They will be solidly on third base. The final stage—which can be quite quick, or sometimes take a long time—is finalizing the sale, getting paid, etc. We'll be covering this at the very end. Any questions?"

"Yes. I've had meetings with prospects that only took 15 or 20 minutes before they decided to work with me. Why does a Strategy Session take so long?"

"That's because most of your selling meetings only focused on your services, what you could do for the client. Then they had what they think they needed to make a decision. As you told me, you were selling lower-end services in most cases. And how was your overall closing rate?"

"Not very good, I'd say, perhaps 25%. I'd meet with them, explain my services, give them a proposal and wait. I guess it worked up to a point. Will I have to prepare proposals if I do Strategy Sessions?"

"Yes, most businesses require a proposal. That's part of getting from third base to home. But the important thing to understand is that now you'll be selling an HEOB- level program that is priced five to ten times what your previous programs were priced at. And even then, my experience with Strategy Sessions is that a 50% or better close rate is common. The fact that you're now selling outcomes, not processes makes all the difference.

"Why don't we get into the first part of a Strategy Session: Setting the Stage"

Strategy Sessions - Setting the Sage

"You want to set the stage for every Strategy Session so that the prospect will know what to expect. Don't jump in with questions, or worse, explain about your services. Just let them know what this Strategy Session entails:

> "Hello, it's good to meet with you. I'm looking forward to learning more about your business and seeing how I might be able to assist you.
>
> "The main outcome (or result) that I provide for my clients is helping them increase profitability by 25% to 300% in a year to 18 months (insert your own Ultimate Outcome here). We do that by helping you develop a higher level of leadership through your teams (insert your own approach here).
>
> "The purpose of this session is to help you get clarity about where you are right now, what your goals are regarding profitability and leadership and what challenges you may have in reaching those goals.
>
> "In addition, if there seems to be a fit, we'll also discuss the services I have to offer and determine if what I do can help you get you where you want to go.
>
> "The meeting will take from 60 to 90 minutes. Does that work for you OK? Do you have any questions before we start? Great, let's get started with some questions about your current situation."

"If the prospect was not clear about the purpose of the session, you need to clear it up before you proceed. If they say, "Oh, I thought this was a sample coaching session," or "I thought you were going to give me some tips on my marketing," or "I'd like to do a session but I'm not interested in discussing your services," then you need to clarify again what this session is about.

"If a prospect wants to do a session that is different from your intention, you have no obligation to continue with the session:

> "I'm sorry that's not the purpose of this session. I want to assure you that this session is very valuable. It will give you some real clarity about where you are now, what your challenges are and what your next steps are. There is no obligation to begin to work with me, but discussing my services is an important part of this session."

"If they say something like, 'Well, I don't know if I can afford your services. Can you tell me what you charge?' you need to let them know that you don't discuss your fees until you have learned more about their needs and told them about how your services work.

"Don't let yourself get sidetracked by the prospect. This process works. But you must follow the process to make it work.

"Once they are clear on the purpose of the session and have agreed to do it, then it's time to continue the Strategy Session in the second part, 'The Interview' where you ask questions about the prospect's situation, goals and challenges. But before we do that, we're actually going to do a role play of setting the stage. I'll be the prospect, you'll be you."

"Is this really necessary?" I complained. "I think I have this down and your script is great but I'm not really very good at role-plays."

"Many people tell me that," said MC. "Of course, you're not very good at role-plays, you've never done this before! But I want to not only hear *what* you say, I want to hear *how* you say it. As simple as this part is, I consider it like playing Hamlet. If you were in Hamlet, you'd learn your lines and practice them until they were flawless. However, when it comes to selling, everyone thinks they just need a few guidelines and that they'll 'wing it' in person without any practice. That's just not professional, nor does it work in the real world.

"I used to let my clients get away without practice and role-playing, but now it's a central part of my work. As we practice this, you'll start to notice the subtleties of the script. One word, one inflection, can make a difference."

"OK, from the top."

Well, practice and role-play we did. And although I wasn't terrible, I certainly wasn't very good. After several tries I started to get the hang of it. What I discovered is that I had to be very confident in setting the stage. In essence, I was saying, "This is my game and we'll play it my way or we won't play it at all." During the role-play MC threw in various objections as to how the Strategy Session was structured and wanted to know the price before we started, my tendency was to give in right away and be apologetic.

"The trouble is that you don't yet have the courage of your convictions," said MC. "That will come in time, but by following the script as closely as possible, you'll grow into it. You need to have answers prepared and then just use them. If you don't, you'll lose control of the Strategy Session before you've even started. Setting the stage builds the prospect's trust and confidence in you."

We did a little more role-playing until I got into the swing of it. I did my best to step into my most confident self, without coming across as arrogant or controlling. Before long I felt comfortable and at ease. MC responded well in that he objected less and I got his agreement quickly.

"I think you understand the first part of a Strategy Session well enough to move on to the interview," said MC. "The interview is the heart of any Strategy Session."

7

Strategy Session – The Interview

"Before we start," said MC, "I'd like to talk about how to conduct your Strategy Session Interview. You're doing more than just asking a lot of questions and getting a lot of answers. It's more like reaching into someone's soul. By the end of the interview you'll know things about this person that no one else knows. They will open up to you and share their life, their hopes and their dreams. And this isn't something you can completely script.

"Yes, you'll script your main questions, but it's the questions between the questions where the real interview happens, and that's hard to script. However, I will give you some guidelines on how to ask these kinds of questions as well."

Questions About the Prospect's Situation

"Your first questions are about the prospect's situation, both past and present. You want to get a general sense of who they are and information about their business. You want to learn about what's working and what's not working. But what you do not want to do in this part of the interview is talk much about your services or even about how you've helped your clients. Forget about you. Forget about what you know about selling. Just ask questions and listen. Make sure you're making notes as you listen.

"Here are some of the questions you might ask:

> I know something about your business, as I've looked at your web site and read a few of the articles on your site. From what I can see, you do ABC and XYZ. Is that correct?

It seems your ideal clients are so and so. Can you tell me more about whom you work with?

What are the main challenges and issues your clients have when they come to you?

Ultimately, what are the outcomes that you help your clients achieve?

What's working the best about your business right now?

What's not working as well as you'd like it work?

"Your questions are a conversation, not a 'grilling.' Take it easy. Show that you are a safe person to talk to. Show real interest. And it's here where your in-between questions are so important. When you ask a question and get an answer, the automatic thing to do is to ask another question on your list until you're done with your list. That will result in a 'sterile interview.' So when you get an answer to a question, you want to 'question into' their answer. Let me do a little role-play with you to demonstrate this. I'll ask you a question; you'll give me an answer:

"What's the biggest challenge for you in your business right now?"

"Well, that would have to be marketing my services and attracting more clients."

"Why do you find this such a challenge?"

"I think it's a few things. First, I don't know what to do or how to do it. And second, I'm afraid I'll waste my time doing things wrong. In addition, I just hate the idea of getting out there and being rejected."

"We'll you're not alone in feeling that way. Would it surprise you to know that most Independent Professionals feel exactly the same way?"

"Yes, I see a lot of successful professionals out there promoting themselves very effectively and it makes me feel like I haven't got a clue."

"Those are probably the ones I've worked with!" said MC laughing. "But let me assure you, for every successful one, there are dozens who are in your shoes. They don't know what to do and have very little confidence.

The question is, are you ready to learn?"

"Definitely!" I said.

I had almost forgotten I was doing a role play, although this conversation sounded very much like the one I had had with MC a few weeks ago when he had interviewed me in his Marketing Strategy Session.

"I'm starting to understand why your interview approach works so well," I said. "It feels like a normal conversation, and you never dominated it. When I asked a question you answered back, and then followed up with another question. When you made a point, you turned it back to me. It was engaging because we were always talking about what interested me."

"Yes," said MC. "If you want to get people interested in you, don't try to be interesting. Instead, be interested. That's the secret behind a successful Strategy Session interview. And this is exactly what nobody does. Instead, they ask a few questions until they can find an opening to talk about themselves and their services. So your in-between questions or follow-up questions are where that magic happens. You show real interest and the prospect feels it. You can't fake this.

"Are you ready to get into the next part of the interview where you ask questions about the prospect's goals and vision?"

"Absolutely!"

"Up to this point you've been asking questions about the present and the past. For this, your prospect uses a certain part of their brain to recall ideas from the recent past and share them with you. For most people, this is pretty easy for them."

Questions About Goals and Vision

"When you talk about goals and visions, the prospect accesses a different part of their brain, the creative part. This thinking happens in the pre-frontal cortex. This is where a person's imagination, goals, plans and vision are generated. When ideas like this are stimulated, they arouse associated positive emotions.

"This is why this is the most important part of the interview and the Strategy Session. You see, people will rarely act if you show them you just understand their situation and can help them solve their problems. That's not very exciting to them. But if you help them tap into a new vision or possibility, then people get more excited, more motivated.

"The other important thing to understand is that some people, especially people who are having problems and who have been stuck for awhile are not generating a lot of creative, motivating thoughts. So your purpose in this part of the interview is to nudge and stimulate that creative thinking. The only way to do that is to be thinking creatively yourself during the interview. You can't bring someone up to a higher level if you are at a lower level.

"Let me give you a number of questions that can help your prospect start thinking more creatively and seeing new possibilities for themselves in the future:

- What excites you most about your business?
- What was it about your business that motivated you to start in the first place?
- What are some of the biggest goals you've accomplished in your business?
- What goal or project are you working on now?
- When you look down the road about a year, where would you like to be?
- What would you like to accomplish in your business that would make a real difference?
- If things were to move in that direction in your business, how specifically would things be different?

"Now, as I said with the first part of the interview, these questions are just jumping off points. When they answer these questions, you want in-between or follow-up questions that enable the prospect to feel more deeply. Let's do another role play, but in this case, I'll be the prospect. You be the professional."

"Ok, I'll give it a try." I had written notes and the questions he had suggested in front of me. I decided to make it simple and started with the first one.

> "Can you tell me what excites you most about your business?"
>
> "I get to help people."
>
> "And why is that exciting to you?"
>
> "It just is."

MC wasn't going to make it easy for me. He was playing it close to his vest and I had to work to draw him out. I was up to the challenge.

> "Can you tell me a story of a client you helped and the difference it made?"

MC smiled. I had asked a good follow-up question.

> "OK, sure, we had done a project for a client who had real profitability problems. The business was in danger of going under. And we provided the expertise and guidance that helped him be profitable for the first time in three years. I remember how grateful the client was. That's the kind of thing that makes this business worthwhile."

Bingo! Well, that worked. Now what? I just jumped in.

> "Earlier you had mentioned that your biggest issue was getting your consultants as excited as you are about your clients. What would you like to see that you're not seeing now?"
>
> "I'd like them to take more ownership of things. I feel they go through the motions but don't go beyond the extra mile to produce extraordinary client outcomes. I'm excited, but they're not. And if I don't find a way to light a fire under them this consulting firm is going nowhere."

I had to remember that this part was not about solutions. I wanted to immediately jump in with some ideas, but instead I asked a follow-up question. I now had a very good idea of what he wanted.

> "What would it mean to your business if you could make this happen?" I asked.

> "It would mean everything to me. I've worked my whole life to build this business, and I want to see it continue after me and ultimately turn it over to my employees but I seem to be far away from that."

MC was quite an actor. I could feel both his commitment to the business and his frustration. And it wasn't even a real business! I continued:

> "So you're looking for more than success, you want a business that lives after you, is that right?"

Then I stepped out of the role-play and said, "OK, that felt like a good transition point to me. At that point I'd probably go to the next step and ask him about his challenges."

"Great job," said MC. "Notice that you didn't even ask many questions. When I was giving you very short answers, you pulled me out of it by getting me to tell you a story and then finding out how I really wanted things to be. It was quite emotional. I really felt it. You were right there, present with me and I felt you understood me and could help me."

I smiled like a school kid who had been praised by his teacher.

"And you were right, this would be a perfect transition to the questions about challenges."

Questions About Challenges

"Every prospect has challenges to achieving their outcomes. If this wasn't the case, there would be no need of your services. Before you offer your services, you need to understand these challenges. As with the other parts of the Strategy Session interview, you want to go into a fair amount of depth so that the prospect becomes aware that the challenges they are experiencing are real and will not go away unless something changes.

“You want to start talking about challenges by taking into account what the prospect has already said about their situation and goals or vision. The main thrust of these questions is: ‘What’s stopping you from achieving your goal?’ Just like the first two parts of the interview, the in-between or follow-up questions are essential. Here’s a transition script and some questions:

> “Now that you've told me what you want to achieve, let’s talk about what's in the way of achieving those goals. What do you think could slow you down, stand in your way or stop you from getting what you want?”

“Note that this overall question is a perfect starting point that will work for almost any prospect.

“Other, related questions might include:

- You’ve worked hard on this for a long time. Why do you think things are still bogged down?
- When you told me about your goals I had the sense that your direction isn’t as clear as it might be. Is that true?
- Have you ever created a detailed action plan to make that goal happen?
- Are there some skills that your team is missing to carry out your plan?
- Are the changes happening in your industry preventing you from moving forward?
- Are there any entrenched mindsets in the organization that stop any change before it gets off the ground?

“In the role play we did, I already told you the challenge – my consultants weren’t working with clients up to the level I expect and demand. So you’d want to go more deeply into that with any number of questions:

> “What do you think is missing with your consultants? Do you think you have the right people? Or perhaps your management and delegation skills

aren't as developed as they need to be?"

"If one question doesn't work, try another. Then follow up if you get more of a response. First, listen to the challenges as they tell them to you. Make sure you hear them and feed them back to the prospect:

> "What often stops me is just getting started. This is a real goal for me but I get stuck in the beginning stages."

"And you respond,

> "OK, just getting started is one of your biggest challenges."

And then you might ask a question for clarity,

> "Do you tend to take some steps and get bogged down or do you never get past just thinking about the goal?" And they might say, "Well, I'll think about it and I might do some things. But I plan a lot in my head and that planning rarely turns into action."

"And then you could say something like:

> "It sounds like one of your challenges is just getting clear about the goal itself. Is that true?" Or, "It seems you are pretty clear about the goal but don't really have a plan to accomplish it."

"Remember, if your prospect can't articulate a challenge, a problem or a pain, they don't really need your assistance. Sometimes they are not aware of these challenges until you make them aware of them. A famous sales trainer once said, 'hurt 'em, then help 'em!' If they don't feel any pain, nothing is going to happen.

"Next you want to know how these challenges are impacting them. It's one thing to have challenges; it's quite another thing to see how these challenges are stopping them from achieving their goals. So help them connect the dots by digging more deeply into this.

"Just go through the challenges they've articulated one at a time:

> "OK, now that you've told me the challenges in reaching your goals, let's

> look at the impact these challenges are having on your business."

"And then, you'd continue:

> "You said that you've had trouble getting projects started and on track and that it's not unusual that most of these projects never get completed. How is that impacting your business?"

"And then ask other questions to go even deeper, such as:

> "What do you think it's costing you in your business not to complete these projects?" (Actually try to come up with a dollar amount.) And, "How does it feel to you that a large percent of these projects are not completed?"

"And then go on to the next challenge. During this part of the interview, you need to be very straightforward, very matter-of-fact. You are not telling them what the challenges are costing them. They are. They are outlining exactly what it means to them to be stopped in achieving their goals.

"By the way, one reason you turn so few prospects into clients is that you fail to go deeply enough into the challenges they are facing. You hesitate because you don't want to go where the pain is. However, until you bring that pain to the surface, they are not likely to take action. When they see where they're stuck and that they'll stay stuck unless they take immediate action, it can be a big wake-up call."

Taking a Break

By this time my head was reeling. "Uh, do you think we could take a break and pick this up again in a day or two? My Strategy Sessions are not until later next week and I want to absorb all of this before we go much further. We still have the presentation of the services and the close to cover, right?"

MC laughed. "Well, I do get on a roll with this stuff. And I could talk about it forever. But you're right. Let me give you a Strategy Session Outline in a Word.doc. It will take you through each of the sections with all of the questions written out. What I'd like you to do is customize it for yourself. Don't make any changes in the sequence; just make the adjustments necessary for you to feel comfortable with the script. Once you're done, practice it out loud a few times until it feels natural."

"OK, I can do that," I said, relieved. "Uh, will you be charging me extra for this additional session? Just wanted to check."

"Of course not," said MC. "You've bought a solution from me, not hours on the clock. I'm here to give you assistance as you need it. In future months we may meet less often, but I'll always be accessible to you."

"Great! OK, can we meet in three days? I think that will give me enough time to get all of this internalized." MC agreed and we ended our meeting for the day.

8

Strategy Sessions – The Presentation

In the two days between sessions I was busy, not just with my assignment but with several client meetings. One of them is worth noting.

In speaking with this client the conversation came around to some areas I wasn't helping him with. We had been working together with his teams in both group and coaching sessions. But an area we hadn't focused on much was running more productive meetings. He wanted to know if I could help him get his meetings under control. Of course, this was something I could do. But I wasn't too excited about giving him another small proposal just to do a workshop on the topic. I found myself suggesting a new approach.

"For the past three months, we've been working on your team development and we've had some good progress with that. But every time we talk, other areas come up that are beyond the scope of what I'm doing. Ultimately what you want is more overall control in your business. You don't just need team development; you need help with interpersonal communications, meetings, and improving productivity. What I want to propose is that we sit down in a few days and look at the bigger picture, where you really want to go and if I can help you get there."

My client just looked at me and said, "That sounds like a great idea. Let's meet next week… how's Thursday?"

I had just booked another Strategy Session!

In my next meeting with MC, I told him what had happened.

He said, "Why are you so surprised? You are now much clearer on what your business is about and how you can help your clients. You realize that nothing short of an HEOB program will really make the difference you could make. Instead of sitting back, wishing things could be different, you are taking action. Now you have three Strategy Sessions on your calendar for next week. I had better show you how to turn those meetings into paying clients!"

"Right, I'm ready now. I practiced the scripting for the Strategy Session interview and think I have the hang of it. I see that the core of it is not having perfect questions, but really listening to the prospect and building trust through that listening."

"That's it exactly," said MC. "Now in the next part you turn the tables and tell the prospect what you can do for him. I call this the Strategy Session Presentation."

Value of the Strategy Session

"Start first by asking them how valuable they've found the Strategy Session so far. Remember, you want to offer real value in this session. If you are just going through the motions and waiting (somewhat impatiently) to get to the presentation part so that you can finally sell them, the Strategy Session may backfire on you. You want to make sure you are interested and concerned about them and that you are there to make a difference. If they get that, you'll get good feedback about the session so far. When you're ready to transition to the presentation, say:

> "OK, I think I have a very good idea of your current situation, your goals and vision and the challenges that are holding you back. Can you tell me what the most valuable part of this session has been so far?"

"You'd be surprised what people will say when you ask them this question. Do you remember what you said when I asked you?"

I had to think for a minute. "Yeah, when you asked me I told you that I didn't realize I had so many challenges that were stopping me. I saw how much resistance, confusion and fear I had about marketing and selling and how much clearer I now was about my situation. I felt really motivated for the first time in a long time to do something about marketing my business."

"Yes, exactly," said MC. "And also note that if I hadn't asked that question you wouldn't have had that clarity. With that clarity you were much more ready to hear about how I could help you. I also want you to realize that all of the steps in this process are very intentional. They have been tested and implemented successfully with hundreds of people. If you stick to these steps, you dramatically increase your chances of success."

The Presentation

"You always want to start your presentation with an overview of the objectives the prospect told you he wished to achieve:

> "As we discussed, the objectives that are most important to you are ABC and XYZ. And your challenges include DEF and UVW."

"Then you say:

> "I just wanted to let you know that the challenges you mentioned are very common. I've helped a lot of people with similar challenges and similar goals. I have a program (or service) that has helped many companies like yours reach their objectives. Can I tell you how it works?"

"That is the actual script you want to use at this point.

"Most often they will say, 'Yes.' Remember, you are asking permission, not manipulating them into anything. You don't need to switch on some 'persuasive sales personality.' Relax, be yourself and tell them about how your services work. At this point they will be eager to know.

"Now, at long last you are getting into the process of how your service works. You are getting into what you do, how you do it, and what this all means to the prospect. Because every service is different, you need to write out this complete presentation for yourself. You can't wing it, but if you're prepared, you can improvise a little.

“Every service has several parts or features and each of these comes with a corresponding benefit or outcome. The best way to present them is by stating the outcome or benefit first, followed by the feature. Then you get agreement on that outcome and feature and move on to the next one until you are complete in presenting your services.

“First, give a big overall ultimate outcome followed by the feature of that outcome. Give it a try based on your CMM.”

“OK,” I said as I wrote it out and then read it to MC:

> “My program is called ‘Take Control of your Business’ because that’s exactly what it does. Clients take back control of their companies and start growing in a way that gives them great results with much less stress. My work includes a combination of consulting, coaching and training over a six-month to one-year period where we work together to achieve your most important goals much more quickly.”

“OK, really good. That will work.”

Checking Agreement

“After each outcome/feature set you want to get agreement on it or ‘close on it’ and answer any questions or objections they might have. If you just go down a long list of outcomes and features without getting any feedback, you have no way of knowing if the prospect is following and understanding you. They may have gotten stuck or confused by outcome/feature number three and if you continue without checking agreement they won’t hear anything you say after point number three. Make sense?”

“Yes, definitely.” I said. Just like you checked agreement right there, right?”

“Exactly.”

“So by making sure they understand how your service or program works every step of the way, by getting agreement or closing on it, you have an engaged prospect who is involved in a dialogue, not a pitch.

"We'll discuss the methodology for answering questions and objections after this part on the presentation.

"A close for each of the points might go something like this:

> "Does that make sense to you?" or "Is that part of the service clear to you?" or "Do you see how that would help you reach your objectives?"

"Again, these need to fit each of your outcome/feature sets. So let's work on this right now. Let's create each of the key outcomes that you deliver to your clients."

Outcome/Feature Sets

I came up with most of these from my HEOB letter, and MC added his ideas, always coming back to the key marketing idea: Every point needs to be a real advantage to your prospect; they are buying outcomes, not a process. In about half an hour, we emerged with these five outcome/feature sets:

1. First, we develop a crystal-clear direction and goals for your company that is motivating to all the stakeholders. We do this though individual interviews, assessments and a two-day visioning retreat.
2. Next we work on aligning your teams so that every goal or project is tied to the company's direction. We'll accomplish this with twice monthly team meetings and some individual coaching by phone.
3. The third step is to build strong management and leadership skills that lead to consistent execution. Skills include project management, delegation, running meetings and communication for results. We'll do this through training sessions and more individual coaching.
4. Then we'll work with you to implement tracking and accountability systems that maintain productivity and momentum on all projects. I have a number of systems I've developed that we'll implement one at a time until it is working smoothly.
5. To sum it up, we have a program that will get your company moving

> in the right direction while getting control of all the parts of your business. You'll see motivated workers, better overall results and increased profitability in your company.

"That sounds pretty good to me!" I said. "This is exciting because I've never been so clear about the actual results I produce for my clients. This sound like they'll get real, substantial value, not just be taken through a process."

"I agree," replied MC. "And it's amazing how differently prospects respond to this approach. Your prospects should be thinking, "How does this work? Does this make sense? Will it work for me?" And if you cover all the details of how your service or program is structured, you'll answer all those questions, getting them closer to saying they want to work with you.

"By the way, this process doesn't need to be excruciatingly drawn out. It can take ten or fifteen minutes in many cases. If your presentation is concise, and focused, and logical, it will go very smoothly. It won't even feel like a presentation to the prospect. It will just be you explaining to the prospect how your program or service works and what they will gain from working with you."

Reviewing the Presentation Process

"Let's review the presentation process:

1. Ask if you can present your services. When they say, "yes," then start with an overview of what you offer and what it's about.
2. Give your biggest outcome first, followed by the feature or how it works.
3. Get agreement or close on this outcome/feature.
4. Continue with several outcome/feature/agreement sets until you have explained the primary components of your program or service.

Presentation Wrap Up

"Then you can end the presentation by wrapping things up. Here's an example I've used in my business. This gives prospects a good overview of how you'll work together and the results you'll produce:

> "In the first part of this program we will work with you intensively to help you learn these skills, develop these plans and get out there as soon as possible doing marketing activities that attract more clients.
>
> "This is a hands-on program where we build both marketing knowledge and skills. You'll not only know what to do, you'll know how to do it.
>
> "We'll track your progress from where you are now to where you go. In fact, each week, you'll send me a progress report so I know what you're working on and what your challenges are.
>
> "The program is customized to your needs and where you are now. Although we cover very specific principles and practices, these are adapted to you and your unique situation.
>
> "So I'll be there with you holding your hand through the process and holding your feet to the fire as well.
>
> "The best part of this process is that once we have worked through all of those steps, you will have a true grasp of how marketing works. You'll be prepared to grow your business in ways you never before thought possible and might even have fun while you're at it!
>
> "Ultimately, you will be left with the strategies, plans and skills to attract clients consistently. You will feel more clear and confident about your marketing and your business.
>
> "The expected outcome is that you will attract more clients with less struggle and effort."

"Sound familiar?" said MC.

"Isn't that what you said to me during our Strategy Session together?"

"Exactly. It's what I say to everyone. I've memorized it. And it's exactly what we accomplish in my marketing coaching program, as you're beginning to see. As I keep saying, scripting is immensely important. It's hard to say exactly what you want to say if you make it up every time. After awhile you have mastered the language of marketing, and you can improvise and still say the right things. For now, you want to develop your scripts and fine-tune them until they get the desired result."

"OK, so I'll create a wrap-up script like that for my program. Now earlier you mentioned handling objections?"

Questions and Objections

"Yes, as you go over the points in your program or service you may get questions or objections. You need to have a good answer for each question or objection, get agreement on your answer and then continue with your presentation points. You may spend several minutes on one point. Here is how the question or objection process works:

1. Question or Objection
Someone asks a question or makes an objection as you're presenting your services.

2. Acknowledge Question/Objection
You acknowledge the question or objection and feed it back to make sure you've understood it correctly.

3. Answer Question/Objection
You answer the question or objection not defensively, but matter-of-factly and with conviction. Develop your own answers.

4. Get Agreement
You get agreement that the question or objection has been answered satisfactorily. If not, you continue the conversation until they are satisfied.

5. Continue Presentation
You continue with the presentation where you left off.

6. Bring up Questions/Objections
Sometimes you bring up questions or objections if they have not been brought up by the prospect, as you know there are issues that can stall the process.

7. Client on Board?

You need to sense when the client is on board with you or not every step of the way. You do this by always checking agreement.

"Let me give you an example of answering a question or objection:

Prospect: "It sounds like there are many parts to this program. I want a program that is simple, easy to follow and implement."

You: "Yes, that makes sense, you want a program that is easy to follow and implement so that you can achieve your outcomes. Am I hearing you correctly?

Prospect: "Yes."

You: "Well, there are many steps or parts to this program but they are all in a very logical sequence. We don't go onto the next step until the one before is completed. We make sure you've gained the skills necessary at each step. This results in reaching your objectives more quickly with fewer mistakes.

"Does that answer your question?

Prospect: Yes, it does."

You: "Ok, great. Let me explain another important part of this program."

"You make it sound so easy!"

"It is easy if you script it in this format and practice it. Remember, I talked about Hamlet some time back? Well, let me assure you, this is not as challenging as Hamlet by a long shot! It's ordinary, everyday language. The key is saying the right thing at the right time. With a little practice, and by doing only a few Strategy Sessions, it will become second nature to you.

"Now the final thing to work on before you're ready to do a Strategy Session is to learn how to close. This is a big fear for many professionals. Believe it or not, in the majority of selling conversations the professional leaves out the close completely. But it's really the easiest part of the whole process, again, if you know what you're doing. Ready to go?"

“Ready as I’ll ever be!”

9

Strategy Sessions – Closing and Confirming

"A close is not a manipulative process where you trick someone into saying yes. A close is confirming whether or not the prospect thinks your program is right for them or not and to see if they are ready for the next step."

Closing is a Process

"Closing is more than a technique. It's also a process. There are two main parts to this process, *asking them* if the program is for them, and then getting them to *tell you* why the program is for them. Another way of saying it is, you close them and then they close you.

"Closing is often the easiest part of the selling conversation, if you have followed all the steps up to this point. If you have, the prospect is often ready to move forward.

"But," I interjected, "I've found that when I get to the close, the prospect always wants to talk price. They'll say, 'I'm definitely interested, but it depends on the price.' And then I get into a discussion about the price when I'm not even sure what the price should be yet. And if I quote a price or even give a range, then the prospect holds me to that price. That's where I get really frustrated about closing."

Handling Questions About Price

"Let me say something about price now and I'll give you some scripting for pricing in a few minutes," said MC. "The first thing to understand is that a close asking the prospect if your services are for them or not is a completely different conversation than whether or not they can afford your services. Everyone mixes these up. 'I can't tell you if I want it before I know the price.' On the face of it, that simply isn't true. There are a lot of things we've wanted before we knew the price. So the first close is to determine whether or not they want it."

Close: Is This Program Right for You?

"So let me give you a sample close that does that:

> "John, as I've outlined, we have a program that is proven to help you achieve your goals and to overcome the challenges to achieving them. It's worked for many, many companies. But ultimately the success of the program will depend on you.
>
> "Let me ask you a few questions to see if this program right is for you.
>
> "First of all, based on what you've heard so far, does this Program sound like something you can see yourself doing and succeeding with?"

"That's part one of the close. Asking if the service or program is for them."

Close: Why is This Program for You?

"If they say yes, then part two of the close is asking them why they think the program is for them:

> "OK, can you let me know why you think this program is for you?"

"Why would you ask this question? Because you want the prospect to sell you on why they want to do it and what they would get out of it. If they are half-hearted about their answer, then they are not sold. And you don't want to move on. If this is the case, continue the conversation:

> "John, I'm not really getting a sense that you are convinced this program is for you. We went over your goals and your challenges and where you want to go in your business. I went into depth about what's included in the program, but now you need to convince me that it's right for you. What do you see happening as a result of working together and getting

control of your company?"

"You want to challenge them but not 'put them on the spot.' This is delicate. If they don't sound convinced, then try to dig out any considerations or doubts they may have:

"Well the program sounds great and I'd love to do it, but I'm not sure I can really get control of my company."

"Then answer this question or objection as outlined earlier.

"If they say no, then ask the reason why:

"OK, can you let me know why you think this program is *not* for you?"

"Get their answers and address any concerns. You may be able to address their concerns and you may not. Answer their concerns in a very straightforward way. Work together to determine if this program is for them or not. Go back to their goals and challenges. Don't try to 'convince' them. Just listen closely and discuss what they want.

"If it is clear that the program is not for them, thank them for considering the program and wish them good luck. If they want to hear the price for the program (after saying they don't want to do it), say this:

"I'd be happy to discuss the fee for the program if it's something you want to do, but since it's not, it really wouldn't be appropriate. I hope you understand."

"Yes, you can really say that!

"If they say, 'Yes, I want to do it, but I'm not sure because I don't know what it costs yet,' say:

"We'll get into the fee for the program in just a minute. But first I have a few more questions to see if this program is really for you or not. Can you take a few more minutes to answer these questions?

"Alright, if you work with me in this program, there are certain things you'll need to do to ensure success. Let me go over them with you."

"Once you get to this point, you're on third base. You've confirmed that they want to do your program, and again, they don't have to know the price to decide whether they want to do it or not."

Third Base to Home

"Moving from third base to home consists of three final parts: confirmation that they meet the requirements of working with you, a proposal and a final agreement on the price.

"First you want to list the conditions or requirements a client needs to meet if they are going to be in your program. You need to think through the conditions for your program or service. Don't skip this part. It's very important because it gets them to commit incrementally to your program. None of these are big commitments, but added up they equal a big commitment to work with you.

"Let's generate a list, just as we listed the outcome/feature sets of your business. You want a list of the things you'll be doing in the program and confirm whether or not they'll be able to do them or not. So you might say these are a series of small additional closes. You can't skip this part, as it will avoid any misunderstandings later on. Go over these one at a time and get agreement on each and answer any questions they may have as you go. Let's work on these."

Requirements or Conditions of Working with You

Once more, in about half an hour we came up with the list of things I needed my clients to do in order to succeed with this program. They were closely tied to my outcome/feature list:

> a) The main activities of the first part of the program are individual meetings with your top people and also 360º assessments of these same people. We'll do that over a couple of weeks to determine their strengths and weaknesses. Is that something you'll be able to coordinate?
>
> b) Directly following this we'll hold a 2-day offsite retreat where we'll set

goals and prioritize those things that you need to get control over and create action plans for each of them. Can you get your people together for that?

c) When you return from the retreat, we'll work at communicating these plans to your various teams and departments and get buy-in. We'll have twice monthly team meeting and individual coaching with team leaders by phone. This is where commitment to this program is key.

d) The next step is to build strong management and leadership skills that lead to consistent execution. Skills include project management, delegation, running meetings and communication for results. We'll do this through training sessions and more individual coaching.

e) Finally, we'll work with you to implement tracking and accountability systems that maintain productivity and momentum on all projects. I have a number of systems I've developed that we'll implement one at a time until it is working smoothly.

f) To sum it up, we have a program that will get your company moving in the right direction while getting control of all the parts of your business. You'll see motivated workers, better overall results and increased profitability in your company.

"They may have questions about the time commitment. That's always a concern. Discuss how they can fit this into their schedule:

g) During the course of the program, some of the assignments will entail taking action and interacting with other people. Sometimes this will mean going past your current comfort zone. These are the activities that build your leadership muscles. Will I be able to count on you to do these assignments as well?

"This can be challenging. It's good if they have questions at this point. Assure them they will not be asked to do anything impossible, or anything you haven't done yourself. Perhaps share a story about how you handled this work:

h) In the process of doing this program, you will likely face challenges and meet resistance. You may get confused, impatient, resigned, and annoyed. You'll want to avoid assignments, do it your way, do it later, or quit altogether. So before we go into this, I want you to know that as long as you follow the program, it will work for you. If you don't, it won't work for you. Are you willing to stick with the program no matter what comes up?

“You want to be light, even a little humorous about this. This is a reality check and you want them to know this will take real work on their part and that there will be some resistance, which is natural:

i) A big part of the program is tracking both actions and results. I’ll ask you to send me a report every week by email to tell me what you're working on, what you have accomplished and what you plan to do the following week. These reports may be the most important part of the program. They only take a few minutes to do, but they really are the glue that holds the program together. Can I count on you doing these reports every week?

“Notice, that after each of the conditions, I ask the prospect if they are willing and able to commit to it. Now that you've confirmed them, it's time to take any final questions:

"OK, you've told me that you are willing to participate in this program fully. Before we continue, do you have any other questions about what the program entails?"

Answering Questions

“At this point they may ask some other questions about the program. Answer them very matter-of-factly, always pointing to the results. For instance:

“You say you'll work with us on specific management skills such as running meetings, improving our processes, etc. When will these be integrated into the overall program?”

“And you answer:

“In the third part of the program, after the management retreat it will be

> clearer what skills need to be developed the most. At that point, we'll schedule training session throughout the year. Will that work for you?"

"At this point, the most common question will be about price:

"OK, the program sounds great; I hope I can afford it. Can you tell me now what it costs?"

Price Close

"If you happen to be offering a program or service to a very small business owner or self-employed professional as I do, I talk about the price right at the end of the Strategy Session. What I usually say is: 'My fee for working together for a year is $XXX per month. Can you make that work for your budget?' Then I stay quiet until I get a response. It might be, 'Yes, I can manage that.' Or it could be, 'Wow, that's a lot, but I need to do this.' Or some will say, 'That's definitely more than I can pay right now.' Most people actually say, 'Yes, I think I can handle it, but I need to talk to my spouse first before moving forward.'

"And guess what, I don't use any pressure or manipulative nonsense. Look, I'm going to be working with this person intimately for a whole year. Ultimately they need to make their own decision; I can't trick them into saying yes. So if they need to talk with their spouse, I say, 'No problem, but can you get back to me within a week with the final answer?' This very well and 70% of the people I do a Strategy Session with end up working with me."

Proposal Close

"Now if you are offering your program to a company of any size, as you are, you don't want to do a price close as I do with individual clients. Instead, you need to tell them you must prepare a proposal before you give the price."

"Won't this just irritate the prospect?" I said, surprised. "They've been meeting with you for up to 90 minutes and you still don't give a price? I'd be afraid to do that!"

"I understand," said MC, "but by doing a proposal, you get to sum up everything the prospect told you – their situation, objectives and challenges as well as outlining the main components of the program. It really makes a difference if you put this in writing. One more thing that may surprise you, I don't suggest you put your price in the first version of your proposal.

"Here's what you say:

> "Okay before I give you the price for this program, I need to put together an initial proposal for you. I'll include a summary of your objectives, challenges and measures of success. I'll also outline all the benefits and components of the program in black and white. I also need your feedback on this initial proposal to make sure we are all on the same page. Once we are in full agreement, I'll give you my fee. What I'd like to do now is set up a phone meeting to go over that initial proposal. I can have it done by Tuesday. Can we talk Tuesday afternoon?"

"One of the reasons I don't like to put a price tag on an initial proposal is that when a prospect looks at the proposal, the very first thing he'll do is jump to the end to the price. Often he won't even read the proposal! But if you leave off the price, this forces him to read it. And in your phone meeting you go over it line by line, making sure you're in agreement every step of the way."

I had one more question. "What if, after the Strategy Session, it's impossible to know how long this project will take? Perhaps they are not good prospects for my HEOB. Can you give them a daily rate?"

"Sometimes," said MC. "But one way to handle this is by giving a price on the first phase of the program, if you are unsure of everything that will be needed for the whole program. For $XXX you will do some interviews and assessments, for instance, and then you'll give them a proposal for the complete project or program once that's done.

"This is a good strategy for design projects, for instance, where it's hard to know the complete scope of the program going in. One way to look at it is the 'blueprint phase' and the 'building phase.' You can't give a price on a building until you know if it's a ranch house or a skyscraper. But once the blueprints are done, you can quote a price for the building."

"OK." I said. "This is useful if this comes up, but for now, I think I know what to do as far as the price close goes."

"After you've closed a prospect," said MC, "we'll spend time on the proposal, what it needs to contain and how it should be written."

Strategy Session Outline

"You now have everything you need to conduct a Successful Strategy Session. Let's quickly go over the outline:

1. Set the Stage

2. Interview

Prospect's Situation

Prospects Goals and Vision

Prospect's Challenges

3. Present Your Services

Main Outcome/Features

Structure of the Program

Answer Questions & Objections

4. Closing

Ask if they want to do the Program

Ask them why they want to do the Program

5. Confirmation (Third Base)

Go over Requirements of Program

Offer Initial Proposal

Proposal with Price

My feelings at this point were a mixture of clarity and overwhelm. I had taken extensive notes and knew what to do, but this was so different than my previous way of selling and closing that I was not feeling very confident, which I revealed to MC.

Practicing the Strategy Session

"I understand perfectly. You know, if you're producing a TV show, the first thing the actors do is sit around a table and do a first reading of the script and then they move to rehearsals and finally the performance. We're going to do exactly the same thing.

"What we've done, in essence, is write the first draft of your script. What we'll do now is go over it a few times until you feel more comfortable with it. Then you'll have the script outline in front of you when you do a Strategy Session. You can have it in front of you even in a live session. You'll use this outline to take notes on. After this, take your Strategy Session Outline and customize and use for all your sessions."

After a short break we sat down and did exactly what MC had said. After about an hour I was feeling quite comfortable. It was all hanging together and all the transitions from one part to another felt easy and natural.

After the third time though, MC said, "OK, you're ready as you'll ever be. After each of your Strategy Sessions next week, give me a quick report back to let me know how they went."

My mind was already in overdrive, assimilating all these materials and anticipating meeting with my three prospects next week.

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Strategy Sessions in Action

I had worked with MC on the Strategy sessions in two long meetings on Monday and Thursday. Next week I had the meetings with my two prospects on a Tuesday and a Wednesday and with my current client on a Thursday. It wouldn't be long before I knew how well this Strategy Session process actually worked.

First Strategy Session

My appointment with the first prospect was at his office in the downtown area. I'd been there many times before during my past project with his company. Before I went into his office I sat in the lobby and looked over my Strategy Session Outline. It was divided into the different parts of the Strategy Session with all the primary scripts and questions. Underneath each of these was plenty of room to write notes. I had practiced working with this outline over the weekend and felt I was ready.

After shaking hands and some small talk, the Strategy Session got under way. To say I was nervous was an understatement. But I always came back to the outline, the scripts and the questions. Mostly I focused on the prospect and really listened.

A few times the prospect answered a question by going down a completely different path, rambling on about how his employees didn't understand his vision. But it wasn't too hard to get him back on track by following the outline. When I asked him what he'd gotten out of the session so far, he gave it a lot of thought.

"You know I have a very successful business. I'm proud of that, but you've helped me see that my direction isn't as nearly as clear as I thought it was. What's also clear is that we've been avoiding some of the hard things. We've been kicking the can down the road too long, hoping things would change. You've made me see that we have to initiate that change. So now that you know about what's going on with the company, tell me how you can help."

"Interesting," I thought, "the structure of this session is working so well that he's giving me the cues for the next step!"

I opened with the Ultimate Outcome of my 'Getting Control of Your Business' program and explained all the different parts through my outcome/feature sets. I was a little nervous about saying them correctly. I had scripted them verbatim but hadn't completely memorized them yet, so I improvised.

"I have a list of all the main outcomes I deliver in this program. Let me go over them with you, one by one." I just looked down at my script for each one and then looked up and told it to the prospect, always checking agreement with each one. It was easier than I thought. When he asked a question, I answered concisely and got back to the script.

It was going 'swimmingly' as they say, until he threw in an unexpected question on the point of, 'implement tracking and accountability systems that maintain productivity and momentum on all projects.' I asked if that sounded good to him and he looked puzzled.

"What do you mean by tracking and accountability systems? Can you give me an example?"

My mind went blank for a moment, seeing the Strategy Session go down the drain, but I recovered fairly quickly. "Well, we'll be putting various business practices into action as we work together, but if we don't track those actions there's a good chance they won't get done. So I utilize a number of systems that track both actions and results so that you and your team aren't just trying to produce results, they are accountable for producing them."

But that didn't quite satisfy him. "OK, I understand the concept, but what are those systems that do the tracking, how do they work? Are they paper-based or computer-based?"

With this question, two thoughts flashed through my mind. First, "I'd better have a good answer for this," and "I've really got his attention, he's really interested in what I can do for him."

"That's a good question," I said, "The system I prefer is a very simple but powerful computer program that can be accessed on the web. As we work together, we enter your goals, timelines and actions. It's like a control panel for your productivity. All your managers enter their own goals and both you and the other managers can see the progress others are making. The clients who have used this have dramatically increased productivity, measured by successfully completed projects."

"Wow" said the prospect. That is something we need. I can't wait to see exactly how it works!"

"Well, after I've explained the rest of the program, I'd be happy to give you a quick demo." I hadn't really anticipated this, but I realized that an actual demo that demonstrated this system needed to be a part of my presentation. Luckily it could be accessed through the web.

I continued the presentation by covering the final outcome/benefit points. And the prospect was getting more interested, not less, as I went. When I asked if he could see himself doing this program he answered that he definitely could, depending on the price, of course. When I asked him why he wanted to do the program, he answered enthusiastically:

"Because we need it, RJ. We really need it!"

I followed MC's advice on putting off the price conversation and went over the several requirements for succeeding in the program. Then I opened my laptop and gave him a brief demo of the tracking system. I was sure to ask if he would be willing to install and use this system, and he answered without a pause.

“Absolutely!”

All that was left was to tell him about the interim proposal. I was dreading that he’d press me for the price, but I explained quite convincingly that it was necessary to customize this program to his needs and that there were a lot of parts to consider. We set up the phone appointment for the proposal review and I left his office feeling like I was floating a foot off the ground.

I called MC and happened to catch him in. “It worked,” I exclaimed, “this process worked. He is solidly on third base. He wants to do it. He’s excited about it. But the one thing we didn’t cover is the proposal process. Can you help me with that now?”

The Proposal Outline

“Of course,” said MC. “I have a complete, step-by-step proposal outline I can send you by email. All you need to do is plug your information into that format. Then before you send it to the prospect, send it to me and I’ll give you some feedback.”

MC always seemed to have what I needed when I needed it. He was certainly earning his fee. If I got just this one client it would pay for his services several times over. But I had two more Strategy Sessions this week. What if I got those as well? The mind reels!

The proposal outline was waiting in my email box when I returned home and I went to work on it right away. It took a few hours, but I saw that I’d be able to save time in the future with substantially the same proposal and a little customization. The proposal was simple, but it really communicated very effectively what the client would get from working with me.

Next, I turned my attention to the second prospect I would meet tomorrow.

His issue seemed even more serious than the first prospect. He sounded discouraged, even beaten. Could I really help him? I didn't know, but in recalling the tone of that call, he sounded like he was ready to get help.

Second Strategy Session

The next morning I met with this prospect in a Starbucks near his office. It wasn't the ideal meeting place, but I got the sense he didn't want anyone else in his company to know he was meeting with a consultant. Or maybe he just liked coffee? I was trying not to judge.

I set the stage for the Strategy Session and he was happy to follow my lead. But when I got into the questions I realized that this might be quite a different interview. My initial appointment with him had been quite long and I was afraid this one may go on forever! He wouldn't stop talking, and talk he did. He was twenty minutes into answering my first question when I felt I needed to change my strategy. If I kept asking him about his situation this session would never end.

I had gotten a pretty good picture of his current situation just from this one question, so I waited for him to finish and then said, "I can see you're not very happy about your current situation. You're not reaching your goals, the market is bad, your employees are ineffective and your cash flow is terrible. Does that about sum it up?

"Yes," he said, rather dejectedly. "Things suck right now. So how can you help me?"

At least he had finally gotten to the point!

"Before I explain how my services work I need to find out one very important thing: What do you want? And I don't just mean a solution to all the problems and issues you told me about. I want to know what you really want in your business and why you want it."

But he didn't answer my question. He went back to his problems and told me he wanted things to be different. But he didn't say how different or really what he wanted out of his business. I had to approach this differently.

"Several years ago you started your business. Why did you start it and what were you most excited about?

His answer was simple and direct. "I wanted to make a lot of money. And you know, I did that after a few years. My company did very well. I made money and I saved money. I bought the best of everything, house, car, vacations. And then about five years ago something happened. My wife died. And the purpose of my business, all my goals, making money and being successful didn't have much meaning to me anymore. I wanted to make money to give my wife everything I could. Now what's the use?"

We sat quietly for a few moments. I wasn't sure what to say.

"When your wife died, your purpose went out of your business. Do you think that's why you business hasn't done so well in the past few years?"

"That's pretty much it," he said. "My business just wasn't exciting anymore. I lost interest. But I didn't have another source of income. I could have sold the business, perhaps that's what I should do, but I don't know. I just go in every day and do the best I can. But it's not the same anymore."

"You need a new purpose," I found myself saying. "Working on your business right now isn't your priority. You have all the skills and ability to do that yourself. But that won't happen until you find a new purpose."

I knew I was on target, but he answered me abruptly, "How am I going to do that? I'm in my 50's and kind of set in my ways. How could I find a new purpose? What does that even mean?"

"Let me define purpose," I said. "It's a sense of resolve or determination to accomplish a certain thing that is important to you. Before, your wife was the purpose for your business. Now that she's gone, you need to find something else that's important and have the purpose of your business be to serve that new thing. I don't know what this is for you, but I've worked with a whole lot of people to do exactly that."

And then I related a story of a client I'd worked with a couple years ago. "I worked with a client who simply got bored with his business. It was too easy for him. His purpose had been one of accomplishment, to win at running his business and he succeeded at that very well. I asked him what else really mattered to him and he told me that he always wanted to be an actor. He was smart, good looking and only in his mid 30's. I could see him as an actor and asked why that interested him.

"He told me that in school he'd always loved drama classes and that he'd acted in both high school and college. However, he was afraid of taking the plunge as an actor because of the financial insecurity. So he started a business instead and had been very successful at it. But he had never lost his love for acting. Now he was very financially stable and had over a million dollars in the bank. To make a long story short, he found a professional manager for his existing business, and set out to build a local theatre company which is now thriving."

I didn't know how this story would land for my prospect but it was the best story I had.

"Wow, he said, "and you helped him do that. That's amazing!" The prospect's face had brightened considerably. "Look, I don't know about acting, but I see what you're getting at. There's got to be more that one purpose in my life. If I found it I could inject new life into my business or perhaps do something completely different that would be more fulfilling. So, can you help me with this?"

"Definitely." I said, "We can work together to help you find your new purpose. And then I can work with you to make it real. Is that what you want?" I was really improvising at this point. It was clear that this prospect wasn't a good candidate for my 'Getting Control of Your Business' program now, yet I knew I could offer him coaching services that would make a difference. But how could I turn this into an HEOB? Would I need to do a proposal and give him the price later?

I remembered the conversation with MC about selling my services to an individual, not a company. I could close and give my fee in this one meeting. My head was busy trying to figure this out when the prospect responded.

"You know, this sounds good to me," he said. "I can't tell you how many consultants I've met with who tried to go in and fix my business over the past five years. I've wasted a fortune and nothing really worked. You are the only person that got me to tell you what was really going on. I already feel energized and excited about finding a new purpose. When can we start working together?"

I had to answer and just blurted it out, "We can start next week. We'll meet three times a month and work closely together to find a new purpose you can be excited about and that creates a new direction for your life and your business. My fee is $2,500 per month and I ask for a minimum of a three month commitment. How does that sound?"

"Sounds perfect! Let's look at our calendars."

When I called MC about this Strategy Session, he laughed.

"You know, you must have some acting ability as well. You improvised very well. It's really a weakness to stick too closely to a script if things are not going in that direction. And since you've done a lot of coaching like this with clients before, what you did made sense. Tell me, was $2,500 per month your previous coaching fee?"

"Are you kidding me?" I said. "The most I've ever charged for a month of coaching has been $750. You see, I always looked at coaching as a commodity. There are so many coaches out there. But he told me himself that nobody else had really understood him, let alone helped him. So I knew I could work with him and felt I needed to state a fee that would make him take this coaching seriously. So that figure just popped out of my mouth. The truth is, I've wanted to charge that fee for a long time, but never had the courage to do so. Thanks to you, things are looking up!"

"You're very welcome," said MC. "Now you have one more Strategy Session for tomorrow. Good luck."

Third Strategy Session

I assumed this final session would be the easiest of all. After all, this was with a client I was already working with and I knew he needed more help. I prepared for the session, actually more than the others because I knew a lot about his business and wanted to leverage that information in the Strategy Session. I was hoping I could get a modest increase in my current contract.

Everything in the Strategy Session went well. My client asked good questions and my answers were getting better. I was also adding a few stories here and there to illustrate certain points. And I made the centerpiece of my presentation the project tracking software. By the time I got to the close, the answer was that he was definitely interested; he didn't even ask for the price. When I went down the list of the requirements for this program to produce results, he took careful notes. And when I told him how I did the interim proposal, he was very agreeable and set up the proposal meeting without resistance.

"Is this going too easy?" I thought. "No big objections or resistance. I wonder how it's really going?"

In my follow-up call with MC he said, "You're never sure a program will close until they say yes or no. Just do a good job on the proposal and see where it goes. But don't assume anything at this point. There are often other factors at play that you won't know about until later."

I now had one more proposal to prepare. It went more quickly than the first as the program was almost identical. I fine-tuned a few things and when it was ready to go in under an hour, I sent it off.

Proposal Meeting with Prospect #1

Next day I had a proposal meeting by phone with the first prospect and it went quite well. He asked me some tough questions that I answered without much difficulty. We added one more outcome and talked about the whole process, especially the project tracking software. I told him that I offered this through a third party vendor who was very reliable and would help him customize it for his business.

We estimated that the project would take about nine months, not a full year. The fee I was planning to ask was $36,000, more than I had ever charged, so I was a bit nervous. At the end of the call, I said, “Ok, I’ll send the completed proposal and fee to you on Monday. I’ll be following up to see if you have any questions.” The prospect agreed. On Monday, after MC had given it his final approval, I sent the fine-tuned proposal with the price at the bottom.

Proposal Meeting with Prospect #3

In the afternoon on Monday I had the proposal meeting with the third prospect, my existing client. Things went pretty much the same with him. On Tuesday I sent him the final proposal for a one-year project with the fee of $45,000. I was getting bolder, but also more nervous.

The Follow-up Panic

Back to the first prospect: I followed-up on Monday and he was out. I left a phone message and an email message. On Tuesday I did the same with prospect number three. Call, message, wait, nothing.

On Tuesday I was panicking. I hadn’t heard back from either of them. And my mind went on a fantasy trip: “Am I kidding myself? I charged too much. They’re probably laughing. How could I have been so confident? MC doesn’t know what he’s talking about. It’s all been a con. Where did everyone go? Why the hell am I self-employed in the first place? Why me?”

In the middle of this nightmare inside my head, the phone rang. “It’s the first prospect," I thought, "calling to tell me I didn't get the project." But it was MC.

"I could hear your thoughts all the way over here," he said.

"What?" I replied. Things were getting weirder and weirder. "What do you mean you can hear my thoughts?"

"Only kidding," MC said, "but since you hadn't called telling me you got one or more of these projects, I guessed, you'd be doing what all my clients do at this point. They go crazy." And then he let out a very sympathetic laugh. "Of course, you're going crazy. It comes with the territory. You put a big price tag on those projects, your prospects haven't called you back yet, and you're convinced the world has ended."

"That's pretty much it," I said, marveling that MC knew me better than myself. "So what do you think is going on? It's been two days for prospect one and one day for prospect three, the one who's already my client."

Prospect vs. Consultant Time

"Let me tell you little about prospect time vs. consultant time. For you, a few days have passed, but it seems like a week, right? But for your prospects, a day or two have passed and it seems like hours to them. For you, a week would feel like a month, but to them a week feels like a day. It's as if something weird happens to the time-space continuum when you send out a proposal!

"Look, all you're doing is thinking about the proposal. But they have other things on their plate. They are running their business, managing projects, putting out fires. The proposals are only one of the many things on their very crowded agendas. But I assure you, they are thinking about them. They're in the queue. And they are not just going to say yes without running it past other people on their team. These things take time, longer than you'd like them to take. That's just the way it works. And no, they don't realize you're going crazy right now as I do!"

"How do you know they're thinking about the proposals?" I said. "How do you know they haven't chucked them in their wastebaskets?"

"I know because this process works. First of all, you had a strong affiliation with each of these prospects. You provided good information. They were willing to speak with you. They were happy to do a Strategy Session with you and the sessions went well. You provided an interim proposal and they went over it, line by line. And then you sent them the final proposal with your fee. Believe me, you can't do it much better than that. Still, it doesn't always guarantee they'll move ahead. So there's nothing else you can do for a while.

"Now it's time to be patient and wait. It may take a few days or even a week or two. In the meantime, we have other things to work on that will help set up your marketing for the future. I want to talk to you about websites.

"Can we meet on Friday?" he asked.

What could I say? MC always seemed to know what to do next.

11

Websites and Mindsets

"A few weeks ago we stopped our work on Marketing Currency to implement the direct outreach strategy to your warms leads. Now it's time to return to the most important Marketing Currency of all, your website. In my opinion, the web is one of the greatest inventions of mankind, rivaling the wheel, the printing press, the automobile, the telephone, manned flight, television and the computer.

"You might think that's just hyperbole, RJ, but just think, the web can connect everyone in the world with words, pictures, sound and video at virtually no cost. It's the most powerful communication medium for business, yet most small businesses completely miss its potential and get very little out of it."

Most Websites Don't Work

"If you look at the average professional service business website, it communicates poorly, is unattractive, doesn't stimulate any action, and essentially just sits there like a lump… like your site, for instance!"

I knew he'd get around to my site eventually. And he was right. I had a six-page website that I designed from a WordPress template. It was rather plain looking; nothing stood out. My home page was filled with jargon that a prospective client could never relate to. My other pages included: About Us, Our Services, Testimonials, Contact Us and a Blog page with seven outdated blog posts. I had put it up about a year and a half ago and had made few changes to it since, except for those blog posts that had petered out several months ago.

"It would be better that you didn't have a website than this travesty," he said with a smile. MC had a way of being brutally honest without being mean.

I was about to protest, but he was right on the money. I wondered why I hadn't worked on it to make it better. The simple answer was that I didn't know how. The more complex answer is that I didn't really know what a good website was and where I should start to make it better. But I guessed I was about to learn.

"A bad website is merely a reflection of all your marketing up to this point. All your marketing has been virtually non-existent or poorly executed. That has got to change. But it's hard to change because of your current 'Marketing Mindset.' A mindset is a set of beliefs or assumptions through which you perceive the world. It's like a lens you look through that shapes your reality. The lens may be clear, or it may be fogged over. And one way to know an Independent Professional's marketing mindset is to look at their website. It's a reflection of how they think about their business in general and their marketing in particular."

What Websites Say About Your Mindset

"So what does my website say about my marketing mindset?" I ventured, not really wanting to know the answer.

MC answered very directly, "Your website tells me you have little confidence communicating about your business effectively; it shows hesitation and lack of rigorous thinking. For instance, you assume people will understand your language even when it contains so much jargon. And it also tells me that you're waiting for someone to discover you and that you are not disciplined enough to stick with things, such as your blog posts.

"All that from my website?!" I said in surprise.

"Yes, but it also helps that I've been working with you for several weeks and seen you in action. Your most positive mindset is that you are willing to learn and work hard if you have direction. But left to your own devices, you'll go back to your old mindsets, and anything you learn from me will be forgotten and discarded in short order. This is the primary reason we'll work together for a year. It takes time to learn the principles and practices of marketing; it takes even longer to change mindsets."

"So what do I have to do to change my mindset?" I said. "I've been trying to do my best in working with you." I was starting to feel a little hurt and defensive.

Noticing Mindsets

"Don't take it so hard, RJ," he said reassuringly. We'll be working on mindsets more intensively fairly soon, but the first thing to notice is that everything you do – or don't do – is a reflection of your mindsets. I simply want you to notice your lack of confidence, hesitation, and the habit not to think things through completely or to complete what you start.

"I wanted to touch on mindsets before we started working on your website. I've noticed that this work can really trigger those, what I call, 'constrictive mindsets.' As I ask you to go even deeper into making a case for your business, all your insecurities and mental laziness are going to be triggered. As you work on your website content, I want you to do your best to be aware of that."

Three Things a Website Can do for You

And with that rather stern prelude, MC started to explain what a website could do and what was possible with effective web marketing.

"The first thing to understand about websites for Independent Professionals is they have three primary purposes. They are, in this order:

1. A way to obtain the names and emails of your prospective clients.
2. A way to educate your prospects about your business and your services.
3. A way to move prospects toward Strategy Sessions or to buy programs or products online.

"You can accomplish all of those with a little work, but most professionals accomplish none of them. Their websites are simply sitting up there on the web taking up space. People visit websites, look around for a minute, see no reason to say and then click off, never to return again. How can you market to someone who comes and goes like that?

"I see websites with enticements on the home page to, 'Call me now about my services.' Why would they? First of all, new web visitors are in the category of strangers; they don't know who you are so there is little trust. And when they read about what you offer, you say very little about how you can actually help them. The focus is mostly on you and what you do, when the focus needs to be on the visitor and what they get.

Getting Contact Information from Web Visitors

"We need to look at what's possible with a website for a first-time visitor. Let's assume that some of your visitors are looking for what you offer. Perhaps they found a link to your site on another site or in a search engine. When they go to your site, your home page needs to get their attention and get them onto first base as quickly as possible. And the very best way to do that is by providing immediate value, giving something away for free. What I recommend is offering your report. It's one of those simple strategies that have worked for years and that still works.

"But you don't give away your *free report* completely free. The cost is their name and email address. They enter these on a simple web form and the report is sent to them by email. In addition, their name and email address go into your e-list database (with their permission) and you can then market your services via email for as long as they choose to stay on your list. With some work and fine-tuning you can get 10% to 20% – and sometimes more – of your visitors to request your report and opt-in to your e-list.

"We'll be talking about what to send to your list later when we explore 'Keep-in-Touch Marketing.'"

Educating Your Website Visitors

"The second purpose of your website is to educate your visitors about your business and your services. Again, assuming that a qualified prospective client is visiting your site, they'll be interested in knowing how you can help them. Once they have opted-in they may choose to visit other pages on your site. But if those pages don't say the right things, you won't get anywhere. Let me give you a list of what I think are the most important web pages for a Independent Professional website and a brief sketch of what should be on every page:

Overview of Website Content

1. Home Page – This should give the visitor a concise overview of your business with an emphasis on *what* results you produce for your clients, not *how* you produce those results. It should have a call-to-action at the end of the page to get your free report.

2. Free Stuff Page – Here is where you'll post a brief promotion for your free report. Yes, you even have to promote free stuff these days! Explain the benefits of the report, what they'll get out of it, a summary of its contents etc. Also, a graphic image of the report helps because it makes your report more tangible, and therefore valuable.

3. Who We Work With – Most professional service business sites don't have such a page. One of the first things a visitor to your site wants to know is: 'Does this person or business help people like me?' This page answers this question by explaining who exactly your ideal clients are, including their problems and aspirations.

4. How We Work – One of the next things a visitor wants to know is how you work with your clients. What actually happens when they work with you? What results do you produce for your clients? What are your approach, your guiding beliefs and process in working with clients?

5. Our Services – This page outlines your various services. This might actually include links to several more in-depth pages if you offer several services. This is where you post your HEOB letter.

6. Case Studies – For many, this is the page they'll visit first. It's an essential page because it relates the actual stories of clients you've worked with in a simple three-part format: a) This was the client's situation before they hired me, b) This is what we did for the client, c) These are the actual results we got for the client. Simple but powerful.

7. Contact Us – You want to make it very easy to contact you. What most people put on this page is their email, phone number and address, nothing more. Instead, you want to thank the visitor for coming to your site, let them know that you would be glad to help them, and explain how you start working with clients. Don't make it a mystery. Explain how Strategy Sessions work, and put in a form they can respond to.

8. Blog – This is where to post your most recent – and regular – blog posts. A blog page that doesn't have any current posts is a big turnoff as it makes the website look abandoned. Later on we'll talk about how you can integrate regular keep-in-touch emails to your e-list into your blog.

"And that, sir, are the pages and content you must have on your website!" MC exclaimed with finality. "Once you have all these pages done, you may add other pages. But often people make the mistake of putting too much content in their website and it becomes confusing and overwhelming."

Website Content, Formatting

"The question is," I said, "how much content is enough? How much information should be on each page? I've see a lot of sites that contain no more than ten bullet points on a page and I've seen web pages that scroll down twenty pages long."

"The short answer is that your pages need to tell the full story for that particular page. That might be anywhere from 750 to 1500 words. An in-depth service page like your HEOB letter can be considerably longer. But a page that only has a couple short paragraphs or a list of several bullet points won't get your message across.

"Every page needs to engage your reader. Remember Marketing Syntax? Most of your pages can use basic marketing syntax: a) here's who this information is for, b) here are the problems and issues you may be experiencing, c) this is how we help you, d) here is some more valuable information, and e) this is where you should go next on the website.

"Also, your web pages need to be formatted for readability. Obviously, people are much more likely to read a page that is easy to read, than one that is hard to read. It still amazes me how poorly many websites are designed and formatted. Those earlier guidelines I gave you on formatting your article and HEOB letter also apply to websites."

Getting Visitors to Contact Your from Your Website

"Next, let's look at the third purpose of a website, and that's to get a prospect to contact you. The truth is, not many people will contact you after a first-time visit. This is why getting the visitor's name and email is so important. In my experience, I get more results when I email those on my list and point them back to my website. I have sold millions of dollars in services, programs and products on my site, simply because I pointed my e-list subscribers back to my website to learn about them.

"You see, a subscriber is on first base once they opt-in. And then over a period of weeks, months and sometimes years, the subscriber moves slowly but surely around the Marketing Ball. They become more familiar with you; they get more valuable information from you, and then perhaps they attend a talk or a teleclass and get to experience you more fully. At that point the subscriber has turned into a real prospect, and when you offer a program or product on your site, a certain percentage are going to visit your site and buy something or sign up for a Strategy Session.

"So the big key to getting people to take action on your site is to build a long-term relationship with your subscribers and then, on a regular basis, promote various services, programs and products with very clear outcomes, benefits and value. The final step is to make a clear call-to-action on all the pages you send them to.

"You make is sound so easy," I said.

"Well, anything is easy when you know how. And the first step to know-how is a single action step followed by another. That's my assignment for you. I have an online 'web content tutorial' that takes you through each of these pages in much greater depth than I've explained here. It also includes samples for all of the web pages I've mentioned. I'll give you access to the tutorial and your job is to work on one page at a time until you're done. You can send me the pages as you complete them. I'm going to give you six weeks for this assignment."

Web Design

"What about the web design?" I said. I know you don't think much of what I have up now. I'm not sure I can do that as well."

"The good news is this is something that you shouldn't do. Designing an attractive web site takes a professional. Once you've progressed with your web content, I'll refer you to my web designer who can make your website look professional and attractive. It will cost some money but not nearly as much money as you're wasting now by having a web that's just sitting there with virtually no marketing impact."

Mindsets That Were Triggered

"One other thing I want to come back to before we wrap up. What mindsets did you notice that were triggered when we went over the purpose and structure of the website? What thoughts, beliefs, or assumptions popped up for you?"

"Well, there were a few. First I thought, 'this is too much work,' and then 'this won't make a difference,' and then 'I don't have the time for this,' followed by, ‘maybe I’m in the wrong business!’”

MC laughed. “Well, that’s about par for the course. When we notice we have these mindsets that are holding us back, the first thing we want to do is resist them and change them, but that doesn’t work.

“The first step is just noticing them, being aware of them. The next step is to simply question them, question their validity, their truth. For instance, is it really true that this won’t make a difference and that you don’t have time? Until we question our beliefs, we are stuck with them, they control us. So keep all of that in mind as you work on your website.

“And as I said, we’ll work on mindsets in depth later on. There are other marketing activities that trigger even more constrictive mindsets. This will be very obvious when we come to them.

“Our next topic will be to return to Marketing Ball and walk you through all the steps between home plate and second base. And, of course, keep me up to date on the progress of those proposals.”

This had been a tremendously valuable session and had given me a lot to think about. There were now more things on my plate than ever before, but I felt energized and up to the challenge. As soon as I returned to my office I clicked on the link in MC’s email and plunged into the web tutorial.

By the time I met again with MC, a lot of things had happened.

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Two Days of Results

Over the weekend I started on my website content by following the guidelines in the website tutorial. And something else MC had said before we parted made a real difference.

The 'Writing I'

"When writing, you should have a pretty good idea about what you're writing about, but it's unimportant to know what you will actually write; that comes in the writing itself, one word at a time. People tend to second guess themselves when they write, worrying over whether they're writing the right thing or not.

"Study the material in the tutorial, look at the format and use it as a guide, and then just start writing. You can always go back and edit later. Don't stop writing a page until you are all the way to the end. Write as fast as you can, without being self-conscious about how it comes out. I predict you'll surprise yourself."

Using this writing approach I completed three pages in less than three hours. When I went back over it, I felt the content was pretty good, and then spent about 90 minutes editing and fine tuning. I had never really written like this before.

I also did my best to pay attention to my mindset while writing. When resistance or the tendency to think it was good enough (when it obviously wasn't) came up I just watched it and didn't get caught up in it. It was interesting, to say the least. There was the 'I' who was doing the writing and several other 'I's' who seemed to have no interest in writing. In fact, they wanted to take breaks, blame MC for giving me this assignment, and tell me that I would never finish this.

At the same time I tried to notice the agenda of those 'constrictive I's' vs. the 'productive I' that was just doing the writing. Only my 'productive I' was focused and calmly moving towards my goal; the other 'I's' had no interest in getting anything done but only wanted to distract me. I wondered, "Why have I never noticed this before?" I made a note to ask MC about this later.

On Monday I planned my week with some apprehension. My goal was to work on more of the web copy, follow up with a few more of my leads and also meet with my existing client who I'd done the high-end proposal for. I was leading a workshop with his company on Tuesday. And then there was the first prospect who I hadn't talked to in over a week and seemed to be avoiding me. I was starting to feel resigned about him, when I remembered another thing MC had said about follow-up and mindsets.

Different Timeframes

"First, you need to remember that your prospect is in a different timeframe than you are. Second, if you spend time worrying you have no mental space free to think creatively about what you could do next. I have a rule of thumb here: whenever you follow up with a prospect, offer some new value. It certainly beats following up with, 'Oh, exalted prospect, do you have any crumbs from your table you can throw my way?' That'll really motivate him to work with you," MC said with a laugh.

Once again MC had pointed out one of my persistent mindsets, a feeling of inferiority compared to my prospects. My attitude was one of a beggar, not a highly trained professional who could turn his business around. Who wants to work with a beggar, no matter how good his proposal was? But how could I follow-up by offering more value?

Moving the Prospect into Action

I took out a copy of the proposal I'd written and felt quite good about it. After all, MC had gone over it as well and had given me some excellent pointers. It came across confidently, the financial justifications were conservative, and the actual work would be both challenging and fun for the prospect. So there wasn't anything missing; it's just that I felt I needed to do or say something that would move the prospect into action. I sat thinking for a few minutes, ideas swirling around like a tornado inside my head.

And suddenly it hit me. Previously I had done relatively small projects for this prospect, never anything this big. I think the most he had ever spent with me at one time was $6,000; this proposal was for $36,000. Instead of ignoring this fact, I'd meet it head on. I picked up the phone, and much to my surprise he was in the office.

"Sorry I didn't get back to you," he said. "On Tuesday I was called out of town and didn't get back until late on Friday, so I've been thinking about your proposal a lot, but I'm not quite sure... Uh, do I need to commit to the complete program before we start?"

My intuition had been correct. He wanted to start but was hesitating about taking it all in one bite. And that was exactly what I was calling about.

"You know, I thought that might be the case. You want to do the program, but making a total commitment up front is a little scary, right?"

"Well, I don't know if it's scary, but although you've done great work for me in the past, this is at a much higher level. Is there another way to get started?"

"Absolutely," I said. "As you know, the program is divided into three main phases starting with the interviews, 360° assessments, and the offsite goal-setting retreat. What I recommend is that we start with this phase first. I'm confident that once everyone has gone through the retreat, you'll be very motivated to take the next step. How does that sound?"

“Sounds good to me. Yes, I know we’ll get a lot of value from this phase. Just charting our direction will make a huge difference. So what will this phase cost me?”

I had thought this out ahead of time and answered, “Phase one will be $9,000. Can you manage that in your budget right now?” Then I held my breath.

“Yeah, not a problem. Let’s look at our calendars to schedule those first interviews and also put a date on the calendar for the retreat. How about a month from now, does that work for you?”

My calendar was open in a month and I could start the interviews next week. We coordinated the dates and hung up. A very loud “YES!” reverberated from my home office.

Maintaining Momentum

In a previous conversation MC had given me a suggestion about follow-up calls: “When you have a successful call such as setting a Strategy Session or closing a deal, don’t take a long break or take yourself off track. Look at your follow-up list and pick up the phone again right away. You want that energy you’re experiencing to carry over into the next call. Remember, people respond viscerally to confidence and enthusiasm; it’s contagious.”

I looked at my list where I saw three past clients who had gotten my report and HEOB letter but had been playing phone tag with me for a couple weeks. It was noon on Monday, why not try now? One call went to voice mail and I left him a message as well as a quick email with times I was available that week.

The second call was picked up by the prospect but she couldn’t talk right then. “Ok, not a problem at all,” I said cheerfully. “You’re a hard person to reach. Do you have your calendar in front of you? Do you have ten to fifteen minutes anytime this week? Early or late in the day is fine. She had already told me she had read my materials, but I knew how busy a CEO she was.

“Hey, I appreciate your persistence,” She said. “I could talk for a few minutes tomorrow at 4:00, would that work?" It did, and as the call ended I felt even more excited. "Just one more call," I said to myself.

The final call was to an associate who had sent me several referrals in the past, but he didn't know anything about my new program. I wanted to set up a coffee and tell him what I was up to and hopefully generate a few more referrals. He wasn't in on the first call, so I did a little more writing on my web copy and called him again. Throughout the day I kept calling back, but not leaving messages.

These calls only took a few seconds, and after each call I continued making headway on my web pages that I'd been working on since making the appointment with the CEO.

At about 3:30 he got back to me. "Boy, this must be urgent," he said. One message and five calls. What's up?" I'd forgotten that even hang-ups registered on smart phones these days. "Nothing super urgent," I said, "it's just that I'm on a roll and wanted to set up a short meeting to talk to you about my new program. It's the best thing I've ever put together and I know some of your contacts are going to want to know about it. And yes, I'm happy to pay you a commission for any client you refer to me as I've done in the past; the commissions will be quite substantial!"

We set up a lunch for Wednesday after he asked me a number of questions and I told him of the first client I'd closed that day. "A $36,000 project in the works? That's great. Yeah, I wouldn't mind earning 10% on that. I've already been thinking of a few companies who need this kind of thing."

It was now four o'clock and I'd closed one client, gotten a phone appointment with a second, and lunch with my best referral source. Not only that, I'd written two more web pages. "This must be the most productive day I've ever had in my business!" I said to myself. "I can't wait to hear what MC says."

Monday was winding down, but tomorrow was the follow-up meeting with my client who was also the third prospect for my new program. “How am I going to handle this one?” I thought. But first I called MC to give him an update and hopefully some praise for how well I was doing. “You’re going to be very proud of me, MC,” I said. “I just turned the first prospect into a paying client,” the wish for praise clearly revealing itself in my voice.

Results as Their Own Reward

“You’re doing great, and congratulations on your first HEOB client,” said MC, “I love to hear about my clients’ results, but you don’t need praise from me. Looking for approval is just a crutch to validate someone who still isn’t completely confident yet. When you’re producing results like you did today, they are their own reward. Three of our most insidious mindsets are pride, vanity and self-love. Of course, everyone has these in abundance, but I’m just warning you that these are all dead ends. They turn a lot of very successful people into egotistical idiots.”

Well, so much for praise and adulation. Nevertheless, MC wasn’t really scolding me or putting me down, just reminding me of what I already knew. Being productive, making positive connections, helping clients, and just enjoying these for their own sake was quietly and profoundly fulfilling. Next I asked him about prospect number three who I’d be meeting with the next day.

MC asked me about the work I was doing with him now, what his biggest challenges were and how confident I felt in my proposal. “Just as confident as the other proposal,” I said, “but it’s a bigger one, and I suggested a year for its completion. I might have to break this into smaller pieces as with my first prospect. I could offer four stages, one a quarter, pretty easily. Do you think that’s a good idea?”

“It depends,” said MC. “You don’t want to give the impression that you’re just selling a bunch of stand-alone programs that are not really connected. The most important key in any HEOB program is that it produces real, tangible, and substantial outcomes. The prospect must understand this, but it’s easy for prospects to see your program as just another process, something to do that might get some results. You are aiming for transformation in your work. To do this you need to get your client to sell himself on these outcomes."

The Perfect Solution

With that we ended the call and I gave more thought to the meeting the next day. First of all, I was meeting with the client not primarily to go over the proposal but to do a training session with his senior staff. After a little brainstorming, the perfect solution popped into my head based on MC's conversation about mindsets and assumptions. It would be a risk, but I thought I could pull it off.

I was at the client/prospect's office at 9 am. Our agenda was a workshop on listening skills with him and his top management team, seven people in all. I had conducted listening workshops many times with clients but with my new idea I had made some last minute changes in the structure.

I started off with an overview about listening.

"Here's the challenge with listening: Almost everyone thinks they are good listeners, but the truth is, nobody has a clue about listening. All listening is filtered through assumptions and misperceptions and then taken personally. So if someone says, 'I'm going to meet with so and so later today,' we'll filter it in some way and perhaps make the assumption, 'I'm not important enough to be included in that meeting,' or 'That meeting is a waste of time.'

"So let's start with your assumptions about my statement: 'You are a bad listener.' What are the first thoughts that come to mind when I tell you that? Just shout them out."

"How do you know I'm a bad listener, you don't know me."

"I *am* a good listener."

"What were the instructions again?" Everyone laughed.

"You're the bad listener, not me"

“You might be right sometimes, but not now.”

“You are absolutely correct.”

“OK,” I continued. That’s a number of responses. Tell me honestly, did any of those responses demonstrate good listening? Only one person agreed with me and I didn’t ask for agreement. How would you characterize the other responses?”

Most came to the conclusion that their answers were defensive assumptions.

“When someone says something that you perceive as an attack, a challenge, the knee-jerk reaction is some kind of defensiveness. But that has nothing to do with listening, does it?”

The workshop was on a roll, the participants were engaged, and by the end had seen many other things they did instead of listening. Assumptions became very self-evident, defensiveness lessened, and true listening started to appear in the room.

I wrapped up the workshop with an assignment, “Your homework is very simple, and it’s not to listen better or harder. That probably won’t work. What I want you to become aware of are the thoughts and assumptions that automatically get triggered when someone says something to you. I want you to become very familiar with that ‘taste’ of defensiveness, avoidance, getting in the last word, and always having to be right. All those act like earmuffs that prevent you from actually hearing the other person.”

I had them in the palm of my hands as they busily took notes. “Just notice that taste without resisting it, or making it wrong. What I predict is that many times you’ll just find yourself listening. In our next session you’ll report on this and see what difference it’s made to your leadership.”

As I spoke, I realized I was echoing MC’s words when he was telling me to be aware of my resistance when working on my website. I was starting to internalize these ideas and they came naturally. “Awareness, not resistance,” I thought, “What a powerful way to look at things.”

I had arranged for a meeting after the workshop with my client to debrief and to also talk about the proposal. What he didn’t realize is that I’d designed the workshop to set the stage for him to really listen to me, not to put me off. I was betting that my strategy would work, but I wouldn’t know until I tried.

We talked about the workshop and he shared some of his own realizations about listening. “What I saw was that when someone is trying to tell me something, I assume there’s an ulterior motive. So I resist and get argumentative. As a result, I deflect a lot of good ideas and advice. How could it possibly hurt me to listen closely and then depend on my judgment to make a good decision? My defensiveness prevents me from taking action when action is needed. This was good stuff today, RJ. So what’s next?”

Without missing a beat I said, “The next thing is to approve my proposal so that we can do a lot more work like this in the coming year and give you a whole new level of control in your business.”

The client just looked at me; I could see his wheels turning, I observed his silent defensiveness rising and then subsiding. Finally he expressed a look of deep insight and clarity. His smile spread slowly and warmly. “Let me get that proposal,” he said.

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Staying on Top of It All

"There are three pillars of marketing success," began MC in our next meeting. "The first pillar is the knowledge, skills and practice of marketing and selling. This is where we'll focus most of our efforts in helping you become an effective marketer of your services. The second pillar is your Marketing Mindset that we've now discussed a few times. Your mindset determines your overall success. Without developing the right mindset, the chances of success are very slim or the path to marketing success will be a difficult struggle. And the third pillar is organization and time management.

Organization and Time Management

"We'll talk about this today because it's the simplest and gives you immediate gains in your marketing productivity. That is, when all your marketing activities are organized you can get two to ten times more done in the same amount of time than everyone else does.

"The biggest enemy of marketing is randomness. First, very few people understand the structure of Marketing Ball and how a prospect actually becomes a client. Just by knowing that, you're more organized, and you've already seen the results. I don't know if you calculated this for yourself, but in the last couple weeks you've gotten two new HEOB clients and one new coaching client, paying you a total of $10,250 per month. You wouldn't have that without playing Marketing Ball!

"The wrong marketing mindsets also lead to randomness. You start out excited to follow a certain marketing plan and strategy, something doesn't go the way you planned and you get discouraged. Your mindsets prevent you from staying focused and on track, no matter what the circumstances are.

"Finally, poor organization and time management tend to result in overwhelm. Before too long, when playing Marketing Ball effectively, you have more prospects, projects, and possibilities than you know what to do with. It's a good problem to have – but only if you learn to manage everything. Otherwise things can fall apart fast, even if you have the right marketing mindset.

"So working on all of these pillars are equally important. The good news is that organization is the simplest and easiest to develop into permanent habits you can use for a lifetime. Let me explain this system now. Before we do, do you have any questions?"

"Where does this system come from?" I said. "Is this something you developed?"

"Like everything else I teach you, it comes from several sources. I've read many books on the subject and tried several things over the years until I found a system that enabled me to be extraordinarily productive. I not only get a lot done, I get the right things done. I don't know if you're aware of this but I'm working with twenty clients actively right now. In addition, I write every week, do my own marketing and am developing software that we'll talk about later. Yet my days are not particularly long and I take off most weekends. Mind you, this didn't all come overnight. But the organizational system I teach should shave a few years off your learning curve!"

I was all ears.

Three Categories of Organization

"You can divide organization into three categories," MC continued. "They are the management of things, projects, and time. Let's cover things first. A thing is any object, piece of paper or computer file. Each of these things are in a certain place at any given time. The goal of organizing things is that you can find them all in ten seconds or less. Can you do that now?"

"I don't think so. I can find most things in a few minutes, sometimes a few hours," I laughed.

Thing Management

"Exactly. It doesn't sound like a big deal, but searching for things can waste huge amounts of time and energy. It can slow your momentum, lead to distractions during the search and end with frustration that colors your overall mindset. There's an old saying that everyone has heard: 'A place for everything and everything in its place.' But almost nobody practices it.

"This is something you can work on yourself or find a professional organizer to help you. You'd be amazed at all the emotional attachments people have to their stuff. In your office, the chances are good that you have two to three times more stuff than you'll ever find useful. So here are my rules for managing things:

1. Go through your office and throw away anything that is of no or marginal use to you. Files, papers, books, old software; chuck it out or take it to a Goodwill store.

2. Re-organize your files so that there's a designated place for everything – client documents, bills, important papers. Label the files and organize them so you can find what you need immediately.

3. When new papers come into your office, such as mail and paper from your printer, immediately put them in their designated places. I handle all my mail in about 60 seconds. Most goes in the recycling box, bills get paid online immediately, other papers get filed, and actions I need to take go on one of my lists. I literally have no in or out box and my desk rarely gets cluttered.

4. Unclutter you desk at the end of every day. Throw stuff out or file it. You need to understand that everything out of place or lost sucks a little energy from you every time you look at it or search for it.

5. Reorganize your computer files. We tend to create new folders in a

random way and put things in that we later forget. Looking for lost computer files can be a bigger timewaster than searching for paper files. In an hour or two, most people can organize their computer files for faster and easier access.

"None of this is rocket science. It's not that hard to do. But once you do, you'll save a lot of time and stress. You'll actually create a more conscious relationship with your things. It's comforting to know where a thing is and that you can put your hands on it in seconds. My assignment is to organize your things within one week."

Project Management

"The next area is projects. We generally have fewer projects than things, but it's very easy to lose control of projects. We think of something we want to do. We jot down a note somewhere. We make a little progress on this and then something comes up and we forget it. Most people have no idea how big a timewaster this is. It's easy to put several hours into many projects that never get completed. In fact, the majority of projects don't get completed, which means all that time you put into them is lost forever with no results to show.

"And unlike things, these projects that fall by the wayside are virtually invisible to us. It seems as if we're productive, busy doing things, but we are making little real headway. Our objective is to *only* work on projects that will forward our goals. If we do this, we only have to work on a few things a day to make very rapid progress in our marketing. To do this, you need to do a little planning. Here are the steps:

"Of course, there are all the little things we have to do each day, but we'll get to those later. We want to look at the big projects first. Here are a few situations: You have decided to do a speaking marketing plan. This has many steps and takes several weeks or months to complete. Another project might be to update your website, which is something you're working on right now. And we also come up with great ideas for any number of projects and then get caught up in them.

“In all of these cases, the solution is ‘project lists.’ For a marketing strategy, you create a Marketing Action Plan. For step-by-step projects you create simple project plans with checklists. And for those ideas that pop into our heads, we also need to make plans. Let’s talk about this one first.

“You might get an idea, for instance, to write a new report and then send it to everyone on your list as an enticement to do a Strategy Session with you. You don’t plan, you just start writing the report when you have a little spare time. In a couple days you have the report done but then you remember another project to contact all your best clients by phone. Oops. You’d better get back to that before you forget. And then when talking to a client you get another idea that you want to get started on before you forget that as well. So you send an email to an associate… and so it goes.

“You got something done that day, but you’ve created no momentum and the chances are good you won’t complete any of these projects. Sound familiar to you?”

“Well, what’s embarrassing,” I said, “is that I know this but still get caught up in it, exactly as you describe. So how do I do all the creative things I want to do and not let them slip between the cracks?”

“First of all, you *want* most of them to slip between the cracks, that is, you don’t even want to start them. But when you have a good idea, it’s hard to stop you. You want to do it now! When that good idea pops up, grab a ‘project sheet’ and give it a title and perhaps jot down a number of things you’d do on that project. Then slip it into a project binder and get back to what you were working on. That takes about two minutes. What I’m saying is that you don’t want to work on any big projects until you’ve actually planned them.

“Then there are the projects that you’ve planned a little more intentionally such as the assignments I’ve given you. For these you create project sheets that also go into the project binder. You’ll probably take a little more time listing and prioritizing the action steps for these projects.

“Finally there are marketing action plans like the one we created for your direct outreach plan to your past clients. We’ll be spending a lot of time on these later. This plan also goes into your project binder. Now before long, you’ll have a number of project sheets or plans in this binder. You can prioritize them with the most important ones on top.

“You need to understand that these lists don’t comprise a daily list. Some people combine all their lists together into one big list and look at it every day. Talk about a formula for overwhelm! No, these project sheets simply become the source material for your weekly list.

“You develop your weekly list in one short planning session every week. You sit down with your project binder and look through all your lists and then pick only the action items for the week that you reasonably expect you can complete. I might have dozens of action items on all those project lists, but it’s rare that I have more than ten items on my weekly list. But unlike a very long list that I *try* to get done, I only have items that I *commit* to getting done.

“So this weekly list is only a page long?” I asked.

“At the most – usually half a page. Of course, if you get all of these items done before the end of the week, you can add some items. Now, in the process of going through your project lists, you’ll come upon a list or two with your new ideas. Then you can choose whether you want to flesh out that plan and start adding its actions to your weekly list, or to leave it aside for now. A good idea you got in a moment of inspiration might turn out to be nothing more than an unproductive distraction. After a few weeks you might rip that page out and toss it away. Of course, a few might turn into very viable plans.

“What you’ve told me so far will probably save me about ten hours a week,” I said. “I think of myself as a productive person, but if I look at all the half-baked projects I’ve started and then forgotten or discarded, I’m really a closet time waster!”

“Without a doubt. And it becomes relatively easy to save this time and put it into projects that are really going somewhere. There's one more step, and that's the daily to-do list. As you can imagine, this list is even shorter than the weekly list. It might be two to five action items. It's not that you only do a few things every day, as you also have appointments, and the little things like checking your email, answering calls, etc. But most of those little things don't even need to go on your list. Those are the things that are coming at you every day and don't need planning.

"So this is one case where less really *is* more. You have fewer, but higher priority items on your list that are parts of bigger projects. Each day those projects move ahead slowly but surely with fewer distractions.

"This habit of making project lists, weekly lists, and daily lists can be harder to establish than managing things, but the payoff is huge. There is one more step to this system and that's how you manage your time throughout the day. It doesn't do you much good if you have perfect lists but things still don't get done.

"I consider each day a game, where the objective is to be both productive and present as much as humanly possible. You see, not only are we random in our marketing and planning, we can be very random in our daily activities. The tool that helps me with this is my 'daily control panel.' It's one piece of paper with my schedule for the day on the left side and my action items on the right side. I actually use a two column daily planner, but you can also do this with the form I've created."

"Isn't this a little cumbersome?" I said. "I'm out of the office a lot, meeting with clients, prospects, etc. I put all my appointments into my smart phone and synch it with my computer when I return to my office."

"Yes, because of the way I work, I'm mostly at my office," said MC, "but a calendar on your phone can't replace your daily control panel. It's very simple; every morning, look at your appointments and write them on the one-page control panel sheet. Then write down your action items for the day on this same sheet. If you're out of the office, just fold up this sheet and take it with you. Look, if you can find an app that can do the same thing, no problem. But for some inexplicable reason, we rarely tie our schedule to our to-do's in one place or on one screen."

Time Management

"The final part of this process is move those action items from the right side of the page to the left on your schedule. So your daily plan might look like this – I'll indent the to-do items:

9:00 am – work on one web page

10:00 am – meeting with client

1:00 pm – return to office – return calls to prospects

2:00 pm – more work on web pages

4:00 pm – phone Strategy Session with prospect

5:30 pm – wrap up day and plan next day.

"So you didn't have a lot of projects on your list that day, but if you stick to it, you'll have made major progress on your web site, in addition to meeting with a client, returning important calls and meeting with a new prospect.

"And by continually returning to your daily control panel you can make the adjustments you need as things change. But you're never trying to get a million things done; only the ones that count. When my clients begin using this system, some start to feel like slackers, but they are getting more done than ever and ending their days at a reasonable time.

"One other thing, remember that you're self-employed. That means you can set your own schedule, meet your clients when it works for you, etc. You want to be your own best client. That is, you want to take care of yourself first, get the important things done and manage your energy. Typically, I will only meet with two clients a day, one in the morning and one in the mid-afternoon. Then I have four hours between appointments when I can work on projects, do writing and also answer calls from clients like you, when they are giving me short updates. I get a lot done, but I am never frantic or overwhelmed, and I also have time to relax.

"My project and time management system also allows me to schedule longer meeting with clients in the first few months of working with them if necessary, and then shorter meetings later on. For instance, we scheduled more time for this meeting because I also wanted to have that more in-depth conversation with you about marketing mindsets today."

In about an hour MC had demonstrated a simple system that would easily double my productivity almost immediately. I was eager to start using those planning forms. But I was even more curious about the mysteries of the Marketing Mindset.

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Marketing Mindsets

"When I gave you the assignment to work on your website a few weeks ago we talked about your marketing mindset. Did those ideas I shared with you make any difference in working on this material?"

"Yes, they did. I started to notice many distracting 'I's' or constrictive thoughts and beliefs that wanted to take me off course. In the past I would have resisted these a lot more, but usually unsuccessfully. When I just noticed them, observed them, without getting sucked in by them, I was much more productive. I was really on a roll there for a few days and not only got a lot of writing done, but stuck to my follow-up calls which are continuing to get results. I'm starting to see why my mindset is a big thing that can either help or hinder my work."

Searching for Ideas

"I'm glad to hear that," said MC. "What I noticed in working with my clients over the years was that people with equal potential tended to produce very different results. One would move forward in his marketing very successfully, another would get bogged down hopelessly. Back then, several years ago, I worked tirelessly on making my marketing models simple and broke everything down into step-by-step processes. Marketing Ball emerged from that work as well as the organizational system I just explained to you. And it definitely made a difference. If you help someone do just very small steps in an organized way, there is less resistance.

"But I kept searching for ideas, systems and tools that would help people get unstuck faster. I read books, took courses, and learned a lot, but nothing that was very effective or simple enough.

"About ten years ago I came across a newly published book that was quite different than anything else I had studied before, yet it was not in contradiction to what I had learned so far, just a new approach. I read this book, met the author at a workshop and ultimately attended her nine-day school. Then I started to use her process on both myself and my clients.

"One afternoon I was sitting at my desk feeling very stuck. I had been procrastinating for weeks on several projects. I felt terrible. Then I thought, 'well, if there's a time to use this process, this is it.' I pulled out her worksheet, and wrote down the thoughts that were going through my mind. It took me awhile to find the core thought, but when I did it was simple: 'I'm just not able to handle all of this work.'

"Then I went through the other steps of the process and in about twenty minutes I was done. To my surprise, the thought, 'I'm just not able to handle all of this work,' no longer had a grip on me. In fact, it now seemed ridiculous. 'Who am I kidding?' I told myself, 'I'm more than capable of handling this work. I've done stuff harder than this a thousand times before!' It was if I'd woken up from a hypnotic trance. I looked around my office and to my list of action items I'd been putting off for weeks with a new sense of clarity. And one at a time, without any resistance, I handled every one of those items by the end of the day.

"And if that in itself was a breakthrough, what followed was even more amazing. For at least six months, perhaps longer, I could no longer *find* procrastination. It had disappeared completely. Every day I wrote down my action items and every day I completed them. I took on bigger projects and got them done. I hired a coach to help me get even more focused and by the end following year I had initiated and conducted a group marketing program that earned me more money than I'd ever made in my life.

"If I ever got stuck, I'd just pull out the process and work on whatever constricting thoughts were holding me back. And, as I said, I started to teach this process to all my clients, also with great results. My clients started to have breakthroughs that seemed impossible before. Ultimately this process became so important that I now consider it as the most important part of my work. Coupled with my work on marketing and organizing, my clients started to attract more of their ideal clients faster, just as you have. You've doubled your income in less than three months. And it wasn't an accident.

"Every client has different kinds of constrictive thoughts. Some resist writing. That hasn't been a huge issue for you yet. Many are deathly afraid of public speaking. And almost everyone hates to pick up the phone and call prospects or follow-up with them. As you continue with this program, I'm going to ask you to do more and more challenging things. And I promise, your constrictive mindsets will start to kick in!

"So I want to tell you more about this process and how you can utilize it as a valuable and powerful tool to accelerate your marketing productivity and your overall business success. Ready?"

A Marketing Acceleration Tool

"Definitely, but I do have a question first." Is this process scientifically proven? How do I know it will really work?" And how do I discover all those constrictive beliefs and mindsets?"

"You can prove this scientifically yourself," said MC. "You can keep a record of where you are stopping yourself now and observe those areas where you are no longer stopping yourself. You get to be your own guinea pig! As to discovering your constrictive mindsets, don't worry, you have hundreds, if not thousands of them. You've already started to become aware of some of them.

"Let's start by talking about these mindsets. I use mindset in the sense that a mindset is a collection of beliefs and thoughts. A cluster of beliefs and thoughts equals a mindset. For instance, a common mindset about marketing is: 'marketing is about manipulating people and manipulating people is bad. But I don't want to manipulate people, so I won't do marketing. I'll just do my best work and pray for referrals.' That particular mindset has resulted in failure for many Independent Professionals. That mindset seems so rational, so true, with so much integrity. But let's look at it more closely.

"Mindsets are held in place by assumptions. The first one is that marketing is manipulative. But if you say, 'I have a service that can help you,' and you can indeed help them, where's the manipulation in that? So perhaps there is manipulation in some marketing, but certainly not all marketing. So that one thought leads to a complete avoidance of marketing. Underneath, other unexamined beliefs are also in action: 'If someone thought I was manipulating them in any way, they would think less of me and would tell others that I'm a dishonest person.'

"We take most of our thoughts to be true and we act on what we believe is true. But what if those beliefs were not true, not anything close to the truth? There are other people who have completely different mindsets about marketing. They might think, 'marketing is a great way to educate people about the value of my services. And if they buy my services, I am confident that they'll get the value of my professional expertise, ultimately improving their situation.'

"The first mindset will make one person avoid marketing completely. The other mindset will motivate another person to increase their marketing efforts. One mindset was constrictive, the other expansive. And the art of working with mindsets is to learn how to transform them from constrictive to expansive.

"This concept is hardly new. In one way or another, this is what teachers, sages, gurus, psychologists and motivational speakers have been doing for ages. But it's sometimes very hard to implement those ideas. However, this one simple process gets you out of 'thinking about' your issues and problems and gets you to question the thoughts and beliefs that are *driving* those issues and problems.

"The first premise of this process is, 'thoughts arise.' Whether you like it or not, you're going to have thoughts. Good thoughts and bad thoughts. Useful thoughts, and useless thoughts. And if you look very carefully at your thoughts, you may realize that you are not intentionally thinking most of them. It's more like they are thinking you. Thoughts arise as a consequence of external influences. You see something you don't like and you have a thought about it. You see something you like and you have a thought about it. You think another thing and you have thoughts about those thoughts. So we have a lot of thoughts, but not a lot of thinking.

"Do you mean we have no control over our thoughts?" I asked. "Certainly we have some control?"

"That's a question you can only answer by close observation. I'll leave that for you to discover. What I'm primarily concerned about are all those constrictive thoughts that are determining your results more than your intentions and commitments. You want to do one thing and you end up doing another. Something starts and then it peters out. You feel inspired and the inspiration dissipates."

"Well, I've definitely seen the impact of many of these constrictive thoughts," I said, "but one thing I can't understand is why there are so many thoughts sabotaging me. That doesn't make sense. Why is it that every time I have a very positive idea to do something, some thought comes in and tells me all the reasons I can't? And as you said, most of those thoughts aren't even true!"

The Genesis of Our Beliefs

"One simple word," MC said. "Survival. The only purpose of all those thoughts are to make sure you survive. Here's how it works. Over the years we've built up beliefs about ourselves. All of these came from life experiences when we were young children. We got a lot of messages, from our parents mostly. They described the world for us. In the same way we picked up our language, we picked up our beliefs. We had absolutely no say in all of this. We just absorbed all of this like a sponge. And it's not that we *had* beliefs, we *became* our beliefs. We completely identified with our beliefs. So if your mother once said, 'all those commercials on TV are just lies' or 'salespeople are just losers,' we take on those ideas and turn them into beliefs that become our absolute truth.

"Fast forward to adulthood, we retain many of these beliefs, unquestioned. We decide to go out on our own because we also got messages that having our own business was achieving the American dream. So far so good. Then we realize we don't have any clients. And someone tells us that we have to market and sell ourselves to attract clients. Not a problem, right? But because we happen have an old belief that tells us marketing and selling are beneath us, or are vulgar, we put on the brakes.

"You see, RJ, it's not about physical survival, it's about the survival of our deeply held beliefs. Who we ARE is our beliefs. If they are challenged, it's like challenging our very lives. So whenever we try to do something new outside of the comfort zone of our own limiting beliefs, the mind jumps in to protect us, to maintain those old beliefs at any cost.

"Then how can anyone do anything that opposes their beliefs?" I said. "It sounds hopeless. You're saying that even though I may have reached a certain level of success, my success is severely limited because my mind doesn't want to go any further. It wants to keep me comfortable and safe. OK, but what about all the incredibly successful people in the world. How did they reach that success?"

"Well, look at the thoughts you may have about these people: 'It must have been easy for them,' or 'They were just lucky,' or 'I could never do what they did.' And those beliefs don't get us any closer to the truth; they keep us stuck.

"If we have success in an area of our lives it either means we were not stuffed full of failure-oriented beliefs in that particular area or that we learned how to change our beliefs. There are no other options. And since it's too late to go back and change your childhood programming, the only option is to learn how to change your beliefs. And that's the purpose of this conversation."

"So in essence you're saying I've been programmed to sabotage myself in various different ways, and I keep doing that to maintain my concept of myself and stay safe inside my self-imposed comfort zone. And you're also saying that I can change my programming?"

The Getting Unstuck Process

"Couldn't have said it better myself," said MC with a smile. "So let me teach you the process that will enable you to do this. I had you start by noticing some of your limiting thoughts, but this is a written process. Later on you may be able to do it without writing, but for now, we'll use this worksheet I call the 'Getting Unstuck Worksheet.'

"The first question on the worksheet is: 'What is the thought or belief that is holding you back from achieving your goal?'

"So I'd like you to pick something you are working on, preferably in your marketing, and then a thought or belief that seems to be opposing that goal."

"Hmmm, let me see, I want to get more meetings with prospects. I'm making some headway, but I find myself avoiding making those contacts and doing the follow-up calls. And the thought that keeps coming up is 'people don't want to be interrupted.'" Then I laughed. "I can't tell you how many times my mother said that to me!"

"OK, perfect," said MC. "It's great when you can not only identify the constrictive thought, you can recall it being programmed into you. And as I explained, say something enough times and it becomes an inseparable part of you, no less than a hand or a leg.

"Now I'll ask you the first question in the process: 'Is that true?' Is it true that people don't want to be interrupted? Just look and give me a yes or no answer."

"Well, yes, it's true. Of course it's true. Hmmm."

"OK, fine," said MC. "The second question is, 'Can you be absolutely certain it's true that people don't want to be interrupted?' Is that always true?"

"Ah, yeah I guess that's a little different. No, I can't be absolutely sure that people never want to be interrupted. I guess in some cases that might not be true."

"The third question is, 'How do you react, how do you behave when you believe the thought, people don't want to be interrupted?' What do you say, what do you avoid, etc."

"Well, for one thing I do everything possible to not interrupt people. If I call someone first I have to believe that it won't be an interruption. But most of the time I lose that argument with myself. It always feels like an interruption, so I avoid making those calls. And if I do call, I feel guilty. I feel like, well… an interruption. I don't feel good. And I try to think of other ways I could connect with people without interrupting them. However, if I'm calling someone I know well, I don't feel bad, I don't feel it's an interruption. Come to think of it, it was always strangers my mother warned me against interrupting. Interesting."

"Yes," said MC, "and that's why I got you to first connect with past clients and close associates. They weren't strangers so you experienced less resistance.

"Now the fourth question: 'Who would you be if you could no longer believe people don't want to be interrupted?' Imagine that you're about to call someone you don't know very well but the thought is simply no longer there. It's gone. Who would you be then? And what would you do?"

I sat for a minute or two pondering this and then said to MC, "If there was no way I could have this thought and there was someone to call who might be a potential client, well, I guess I'd just pick up the phone and call them. No problem. Hmm, but there really wasn't any problem before, except in my own thinking, right? After all, I really can't absolutely know if this person would be bothered if I called. Wow, that's amazing." I sat there, feeling kind of stunned.

"What happened," said MC?

"Well, it feels like about 40 years of programming is unraveling. I now see that by calling someone I wouldn't automatically be interrupting them. And if I did happen to interrupt them, so what? I also noticed the thought that if I interrupted I might be punished or they might hurt me. And that's just nonsense!" A smile spread over my face.

"Pretty cool, MC!"

"Thank you, but we have one more step. It's called the turnaround. I'd like you to take the exact opposite of the original thought, 'people don't want to be interrupted.' I see at least two turnarounds."

"OK, I'm game. I think the first one must be, 'people want to be interrupted.' How's that?

"And is that just as true or truer than the thought, 'people don't want to be interrupted?'"

"At least just as true. I can't tell you how many people I've called who were glad I contacted them, especially on follow-up calls. They were grateful that I made the effort. So perhaps it's even truer. People do want to be interrupted. How about that!"

"OK, can you find another turnaround," said MC.

"Let me see, the exact opposite, right? Well, the only other one would be, '*I* don't want to be interrupted.' That's true enough! I don't like to be interrupted. Or at least I hate being interrupted by telemarketing calls. And that's what I'm associating my calls with. But the truth is, they're not the same at all. Because I hate telemarketing calls I think all calls are like that and I turned that into 'people don't want to be interrupted.' I'm starting to get it."

"This process is very simple," said MC. "It just gets you to see the way things really are. Virtually none of our constrictive beliefs are true. They are just protecting us to maintain our pre-existing beliefs. When we see that truth very clearly about a specific belief, something opens up. We start to think more clearly. And when we start looking at new possibilities, it's hard for that old belief to sabotage us anymore because we've got its number. It can't 'con us' anymore.

"One more valuable technique related to mindsets is what I call 'unsticking images.' Not only do we have thoughts and beliefs that stop us and keep us in our comfort zone, we have a never-ending stream of images that block us just as effectively.

"Your issue of interrupting people is a perfect example of this. In addition to thoughts, you have images of the people you think you're interrupting when you call them. What's the image of a person you don't want to interrupt?"

An image sprang to my mind immediately. "It's a big guy, the CEO of a company, with a mustache and a cigar in his hand. He's sitting in a huge executive chair behind a massive mahogany desk inside a vast, ornately carved, wood-paneled room. Behind his desk is a giant window looking out over Wall Street."

MC laughed out loud. "Yeah, that's a guy you definitely don't want to interrupt! But tell me, is that image true? Have you really ever encountered anyone like that, let alone a client of yours?"

"No, I guess not, but when I make a follow-up call to someone I haven't met yet, that's pretty much the image that pops up. I see him as powerful, inaccessible and definitely not someone who wants to be interrupted by me!"

"Exactly," said MC, "and can you absolutely know that the person you're following up with is like this?"

"Well, of course not. It's absurd"

"Yet, like our thoughts, we attach to these images unconsciously, perhaps for years, and as a result we stop ourselves from making those calls, or we make them under a cloud of fear and intimidation. Since this image is completely false, why not replace it now with a more realistic image?"

"OK, let me see. A real image would be a quite normal looking person, a man or a woman, who is very busy. They are rushing from meeting to meeting. Their office is comfortable but modest. They are juggling a lot of projects, trying to stay on top of things and concerned that their business is succeeding and profitable. They are always on the lookout for sharp people who can help them achieve their goals. When they get a call from me, they are usually enthusiastic because they know they'll get value. That about sums it up. It fits most of my clients to a T."

"Perfect," said MC. "Now for a minute I want you to imagine making a follow-up call to someone like this instead of the person in your first image. Let me know what that's like for you."

I closed my eyes, visualized this person in their office and then imagined picking up my phone, giving them a call, reaching them, and having an upbeat, productive conversation. I opened my eyes and said, "That's amazing MC. Instead of a feeling of dread I felt excited. I didn't feel small and insignificant; I felt confident and powerful. You might not believe this, but I have never had the urge to make follow-up calls before, and right now, that's all I want to do!"

"Now that's what I call a transformation," said MC. "To wrap this up, let me give you a few more tasks to complete between now and our next meeting in two weeks."

1. Complete all your website content and call my web designer to start working on your site. She's waiting for your call.

2. Complete any of your outstanding follow-up calls.

3. Do an organizing blitz of your office.

4. Set up your new project and time management system.

5. Do the Getting Unstuck Process on a minimum of one constrictive belief every single day for two weeks. And be sure to include images as well as thoughts and beliefs. Work on them until you can turn these around into ones that are empowering, not debilitating.

And get to work with those new clients you just landed. Go beyond the extra mile. Take this energy you have and turn it into breakthroughs for your clients."

That was a lot of things to do, but the list felt light as a feather.

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Marketing Strategies

The next two weeks were busy, especially with my new client work. I took MC's advice and scheduled client meetings so that they worked for me first. I decided not to meet with clients on Mondays so that I could spend time on marketing activities, limited client meetings to three hours, and phone coaching to 90 minutes. Even though I was quite busy I still had a lot of time for myself and could easily fit in five more clients. With five more clients I'd be working with nine clients total and be making close to $40,000 per month. On paper that looked like pure fantasy but it only meant about one or two client meetings or sessions per day.

Putting Ideas into Action

MC had also talked to me about goal setting: "Setting goals is a useful thing to do; without them you have no game, you become aimless and your activities become random. But when we set high financial goals it's easy to become 'at the effect' of those goals, that is, the goals have you, they run you. So you want to have goals and remember them but put a lot more focus on how you play the game. One objective is to attract clients, but even more important is to help your clients produce extraordinary results. Without that, you have nothing."

Of course, in addition to client meetings I also needed to work on program development, and doing a fair amount of writing. However, all of this went a whole lot better when I purged my office of unneeded things, cleared my desk and worked at developing a habit of 'thing management.'

The project management system became a whole new way of getting things done. I thought I managed time quite well before, but now I saw that more than a third of my time was completely wasted with low-priority tasks. By the end of the two weeks, I had created several project lists, a list for each week, and a daily control panel every day. I saw why he called it a control panel. It became the focus of every part of my day. I turned to it several times daily to make adjustments and get me back on track.

The final task of doing the Getting Unstuck process every day wasn't so easy to start. After all, I really didn't think I had many of what MC called constrictive mindsets. Boy, was I wrong. I sat down for a few minutes in the morning after planning my day and thought about different scenarios where I got stuck, not just with my marketing, but with my business in general. Here are some of the mindsets I discovered:

- It's impossible to be truly successful in my marketing
- Clients should appreciate me more for my gifts
- If I have to market myself, it means my services are substandard
- Only word-of-mouth marketing gets the right kind of clients
- This piece of writing needs to be perfect before I send it out
- Who's kidding who, marketing is just hype
- It's going to take me forever to learn what MC knows
- My clients don't listen or really care
- Someone is going to discover that I'm a fake
- Selling or Strategy Sessions, they're still manipulative
- People should just know I'm good without any marketing
- I have to know exactly what I'm doing before I start

The crazy thing is that I 'just knew' all of these were true before doing the unstuck process. But by the time I got to the 4th question and the turnaround I saw that in most cases, the exact opposite was true. I started to understand why MC called these constrictive beliefs. It's as if they squeezed the life out of you like a boa constrictor! The four questions and turnaround loosened the grip of these mindsets and left me feeling expansive, full of possibilities and energy.

I also discovered a number of interesting images related to my marketing efforts. One was me standing in front of a large group giving a talk where nobody was listening, no matter how loud I spoke. Another was me sending out an email that dissolved into cyberspace never to be seen again. And a final image was handing my card to someone in a networking event only to have them rip it up and throw it away.

When I reported my progress in my next meeting with MC, he seemed pleased. "I want to acknowledge you for one thing," he said, "and that's for doing the assignments I give you. I have a saying: 'homework is the key to success.' For most people, homework is not sexy or interesting. People love data, information, techniques and models. I can't blame them, but without taking action, all those ideas just turn to dust. Keep doing what you're doing and you're going to surprise yourself with the level of results you produce, not to mention the difference you'll make to your clients.

"As to your work on your mindsets and images, great work. When you start to take mindsets seriously you discover things about yourself you have never imagined before. You discover that thoughts and images are controlling your life more than you are. Sounds kind of grim, but on the other side of those constrictive thoughts and images are possibilities in your business and life you've never imagined."

Then he quickly shifted gears and got back to the game of marketing.

Marketing Ball Review

"Today I'm going to give you a quick review of Marketing Ball and then outline more specifically all the steps you need to take to play the game between home plate and second base.

"When we started, the first things we worked on were your core marketing message, your HEOB letter and your 10 mistakes article. That gave you a foundation to start playing Marketing Ball. And then I gave you the task to put a marketing strategy into action. We created a simple plan and you started contacting past clients to tell them about your new program. Well, we learned how that turned out! Out of sixteen contacts, you turned three of them into clients.

"That's the good news" he said, "but the bad news is that you can't keep going back to those sixteen contacts over and over. Sure, you might create other HEOB programs, but there's a limit to a list of sixteen. Others I've worked with have had good lists of several hundred and we could tap into their lists for a long time. But sooner or later you're going to have to go back to home plate and start playing a new game with a different strategy.

"Today I'm going to give you a broad overview of the best marketing strategies for Independent Professionals. All are different, but they all follow the same Marketing Ball game plan.

"So first, let's look at Marketing Ball game more closely. Before, we talked only about the bases. Today we'll also look at the positions between the bases." He handed me a Marketing Ball diagram that showed four positions between each base and then explained them one by one.

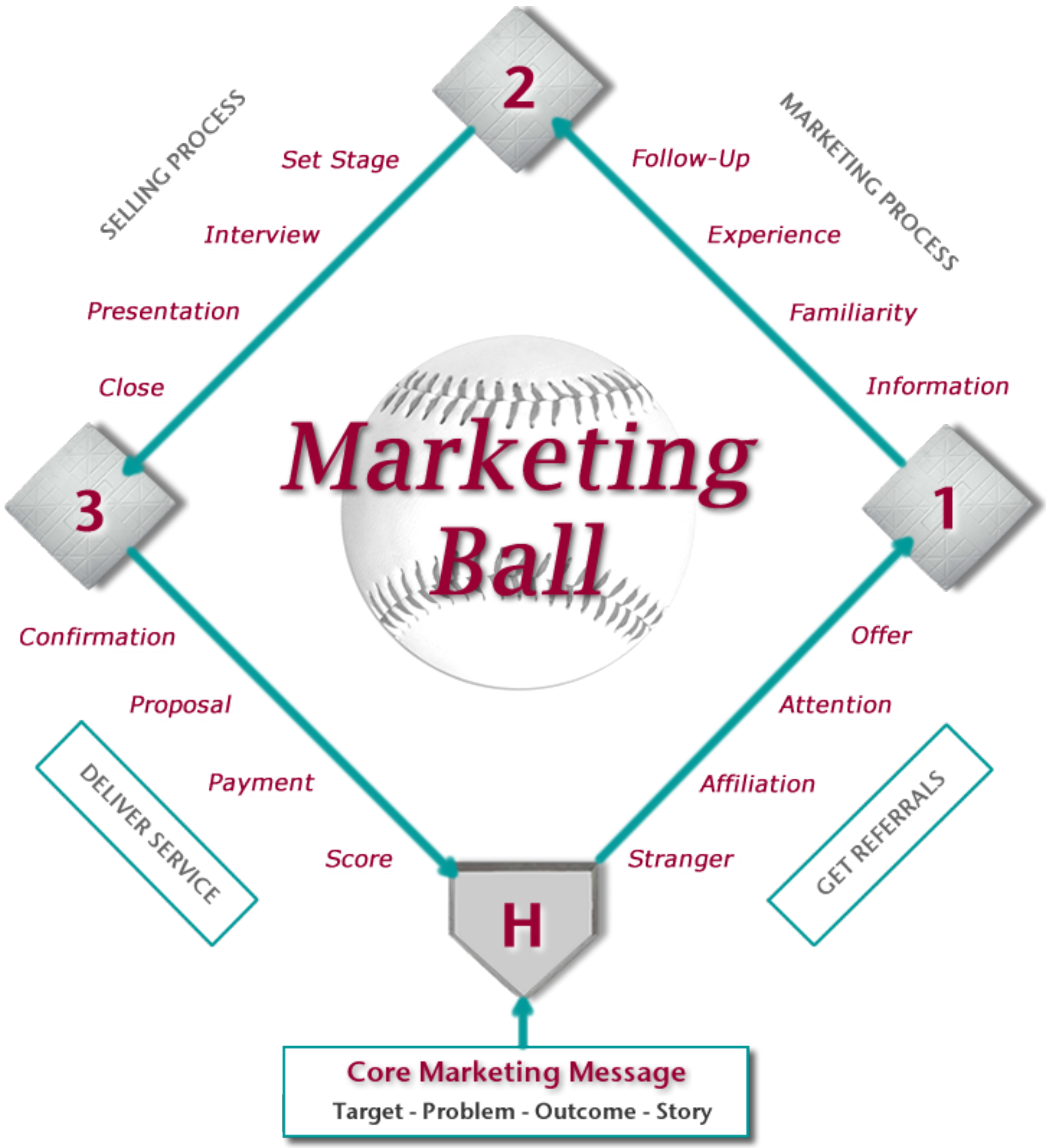
Home Plate – You can start your game when you have the right messages and materials. Different games may need different messages and materials.

Stranger – These are the first people on the baseline between home and first. You can market to these people, but that's a more advanced game.

Affiliation – These are prospects that you have some kind of connection with. If you belong to the same organization, chamber of commerce, professional group or service club, that connection makes it a lot easier to market to them.

Attention – This is the first active step of marketing. You deliver your

Marketing Ball Diagram with Positions



message in many different ways to those you have an affiliation with. You know you have their attention if they show some degree of need and interest.

Offer – This is usually information you offer to a prospect once you have their attention. Your report is a perfect example of this.

First Base – When you have connected with someone you already have an affiliation with, gotten their attention and then offered them some information which they accept, your prospect is solidly on first base. As you'll discover, there are a whole lot of different strategies that can get you onto first base.

Information – Once you have a prospect on first base, you start to move that prospect along the baseline to second base. The first step is providing more information to the prospect. The report is a start. Then there's web copy, articles, e-zines, etc. Information educates your prospects about how you help your clients.

Familiarity –The next step is building familiarity; that is, getting to know your prospects and them getting to know you. This often takes multiple contacts over a long time period. Networking , e-zines and social media are great for this.

Experience – The third step is to give your prospects a deeper sense of you and your services. This is best accomplished through some kind of presentation such as a speech, teleclass or webinar.

Follow-Up – For many, this is the hardest part of the whole marketing process. You must take the initiative to follow-up and invite the prospect to take advantage of a Strategy Session, which you already know all about. Follow-up is key to ultimately turning prospects into paying clients.

MC concluded, "That's the essence of Marketing Ball in a nutshell." If you learn theses steps, follow the rules and practice with determination you will attract a steady stream of ideal clients for the rest of your career. Do you have any questions?"

“Can you tell me a little more about referrals,” I said. “Where exactly do they fit into this game plan?”

“Referrals, or as I like to call them, ‘introductions to prospects from existing clients’ gets your prospects up to first base immediately. Your client has already shared enough about you and what you do that they are interested in knowing more. In addition, these prospects usually move from first base to second base more quickly than the average prospect. Often all it takes is one phone conversation or short meeting, especially if their connection to your client is very strong.”

“How long does it take to move a prospect from affiliation to second base?”

“That depends on many factors, some of them out of your control. The prospects are the big X factor in the Marketing Ball game. Some will have more need and interest than others. But as you saw, generally, the stronger the initial affiliation, the faster the process goes. And some marketing strategies move prospects through the game much more quickly.”

“You put a big emphasis on ideal clients and high-end clients. Are they harder to market and sell to?”

“Sometimes, but not always. They are often the hardest to form affiliations with and harder to get their attention. Again, certain marketing strategies work better to get the attention of higher-end clients. But remember, an ideal client need not be the CEO of a multinational company. I’ve built a very successful practice working with high-quality Independent Professionals much like yourself.”

“How much time do I need to spend to get momentum in my marketing and start turning prospects into paying clients?”

“At the beginning it will take longer than after you have mastered a particular marketing strategy. And some strategies are very long-term. That is, prospects may be in your Marketing Ball game for a long time before anything happens. I like to get my clients to implement the strategies that will get clients the fastest.

"Of course, the other big thing is how fast you learn, how completely you do your assignments and how quickly you master your mindset. Holding on to constrictive mindsets can hold you back for a long time. With the ability to shift to expansive mindsets quickly you'll produce results at levels that are hard for you to imagine now. Closing your third prospect was a good example of that. With your set-up of the listening workshop and one very focused close, you landed the largest client of your career. No reason you can't do that kind of thing over and over again."

As usual, MC was making my head spin. However, the framework of Marketing Ball was becoming clearer and clearer. "OK, well that's all the questions I have for now," I said. "What's next?"

"Next I'm going to give you a brief overview of several marketing strategies and give you the task to get started on one of them. Let me list them all for you:

Networking, Social Media and List Building

"These marketing strategies are all about building business relationships. Most people implement these strategies very randomly. I'll show you how to turn networking and social media into a game that generates long-term connections as well as short-term clients. The big key is the groups you associate with."

Publishing and Keep-in-Touch Marketing

"Getting information out to as many people as possible builds trust and credibility. Publishing includes everything from reports, articles and white papers to books. But the most powerful publishing for most Independent Professionals is blogging and email newsletters or e-zines."

Presentations, Speeches, Teleclasses and Webinars

"Perhaps the most powerful marketing strategy of all for most Independent Professionals. These strategies build familiarity, provide information and give your prospects an experience, all at the same time."

Direct Outreach

"This includes any marketing activity where you take all the initiative in reaching out to qualified prospects, usually those you already have an affiliation with. It can be very effective in certain circumstances."

Joint Ventures

"A very focused strategy that can attract the most qualified clients of all. This is built on the principle of borrowing the credibility of another to quickly build trust with you. This can be integrated with other strategies. I'm already seeing some possibilities for you to use this strategy before long.

"We're going to start with Networking, Social Media and List Building. To be successful with this you need to throw out most of what you know about building successful business relationships."

That was good news, because I never really liked networking. It wasn't a lot of fun going to cocktail mixers or early-morning leads-exchange groups, meeting strangers and exchanging cards. I had tried many of these but they yielded few results. But like everything else, MC put his own unique spin on networking. He started with a provocative statement.

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Networking, Social Media & List Building

"Most networking activity is a total waste of time, money and energy," MC declared. "People network in various groups to gain visibility, make contacts and find leads. And this could happen if people did networking in a way that actually worked. But look at what happens at a typical Chamber of Commerce gathering. You meet in a monthly business-after-hours session, for instance, talk to everyone about your business, exchange cards, and then wait for something to happen. It usually doesn't.

"I can't tell you how many meetings like this I'd attend, exchanged cards with someone who said they had a service that I could use and then never got a call back. In the rare instance that you do get a follow-up call, the person on the other end of the line tries to sell you without getting to know who you are or what you need. Everyone breaks all the rules of Marketing Ball. Of course, they don't know that Marketing Ball even exists or what the rules are!"

Where to Network

"But before I get into what to do, let's talk about where to network. I've always said that networking is a little like dating. You don't just find a group, join and go to all their meetings. No, you check out a lot of groups, determine if there's a fit and then get very actively involved.

"Not all networking groups are created equal. Most are structured very randomly. You pay your fee and show up. The thing is, who are the other members? Are they possible clients or those who could refer clients to you? In your business you want to network with business people who can understand what you do, are not direct competitors, and ultimately refer you to their clients. So that narrows the field somewhat. Chambers of Commerce are comprised of a wide variety of small businesses, yet the majority of those who attend events tend to be new business owners looking for clients. Professional groups can be great places for professional development and camaraderie. Sometimes referrals can come out of these groups.

"But I prefer groups that are populated by serious business owners in two different categories. The first are professional groups with members who are in a different profession than yours. I'm a marketing coach and consultant, so I didn't join a group of marketers. I went to groups with consultants, coaches and trainers. Those are my perfect clients. Whenever I told someone that I helped professionals like them attract more clients, they were all ears.

"The second kind of groups can be harder to find. You might call them exclusive groups that don't just let anyone join. Their approach is not to attract more members, but to attract the right members. So in your case, you'd want to find a group that included a mixture of successful professionals and business owners. They are there to do businesses, to make solid connections. They are not beginners. Ideally, you want to mix with people who are more successful than you are.

"One of my clients belonged to such a group and made networking with its members her primary activity. She was a leadership consultant and coach. Most of the members were successful professionals and business owners. They encouraged active networking and getting together with each other for one-to-one meetings.

"She put a campaign into motion designed to meet with fellow members, get to know them, explain what she did, and how she helped her clients. It took her awhile to get comfortable with the group, develop a message that got attention and do follow-up from these meetings. So she spent a lot of time in the first steps of Marketing Ball: getting attention, developing familiarity, and offering information. After several months of focused work in this area she started to get introduced to very good prospects, several of whom turned into excellent clients."

Marketing Conversations

"One of the key things in my coaching with her was working on 'marketing conversations,' A marketing conversation is not a selling conversation. It's simply exchanging information about each other's business. And the biggest mistake people make in marketing conversations is talking mostly about themselves. For instance, when someone asks us what we do, we answer with our core marketing message and then often take that as a license to tell them everything possible about our businesses. Listening goes out the window."

"I've met a whole lot of people who have done that," I said. "And I've certainly done it myself. It's kind of hard to not talk about yourself when someone is showing interest. How can you keep a marketing conversation like this going so that something actually comes out of it? Most don't seem to go anywhere."

"It's not that hard if you remember a few rules of marketing conversations. Let me outline them for you:

1. Always try to ask the other person what they do first.

2. Ask lots of follow-up questions. Show interest and be interested in them. Really listen. Forget about your business. Don't wait for the opportunity to jump in. If you're networking with serious business people, sooner or later they'll ask you what you do.

3. When they ask you what you do, use a version of your CMM. You might state the kind of problems your clients have or talk about the solutions you provide. But don't label yourself or start talking about your process.

4. If they ask you a follow-up question, answer briefly and concisely and then turn things around and ask them a question.

5. If you feel there's a potential connection, ask for a card and offer yours.

And then always ask if you can send them your report or other information.

6. When you return to your office, send them your report by email and, if they gave you permission, add them to your e-list (more about that later).

7. In a certain percentage of cases, with those you feel have potential, follow up to have more in-depth conversations by phone or over coffee.

"That's how to play the networking game successfully. Do this with enough people and you'll gain a reputation as a person who listens, who has valuable information and produces great results for their clients. That's the kind of thing that leads to referrals and Strategy Sessions.

"I think I see my biggest networking mistake," I said, "and that's failing to follow up. I'll meet with someone at a meeting, have a brief conversation, and exchange cards. But when I met them again at a meeting, there wasn't a lot to say. So I got up to the level of some familiarity, but no further. How could they possibly refer me to anyone if they didn't know more? So by getting my report to these people and following up, it could take things to a whole new level."

"Exactly. And why didn't you offer information and follow-up?"

"Well, first I didn't understand the game, and second, a constrictive mindset that convinced me I shouldn't be too pushy but should wait for others to make the first move."

"Yes. It's amazing how many of our mindsets are based in fear. Fear of rejection, of not being accepted, of being thought of negatively, ad infinitum. But you're starting to see how those mindsets not only don't work, they aren't even true. Who would you be if you couldn't think those thoughts anymore?"

"I'd be one powerful marketer and networker, that's for sure!"

A Networking Task

"OK, here's your task for this session. Do some research and find some business groups to check out. Schedule to attend a few meetings. Scope them out, get a feel for the groups. Have several marketing conversations to understand what the group is like. Ask members how the group has worked for them. This process can take a few months to get rolling, but ultimately can be a great source of ideal clients for you."

Over the next several weeks I carried out this task to launch a networking marketing action plan. I looked on the Internet for local groups, asked my closest associates and a few of my clients. I emerged with a list of four groups, and over a period of three months had attended at least one meeting with all of them.

However, one group really stood apart, BNC – The Business Networking Club. It was a group like MC had described. All the members were professionals and business owners. The membership fee was rather steep compared to a Chamber of Commerce and they required an application and referrals to three clients and two business associates or vendors. Frankly it was a little intimidating, but I took the plunge and made a commitment to come to their weekly morning meetings.

I created a very specific game plan as MC had suggested, where I started with a goal and worked backwards to my actual networking activities. The goal was modest, but if I achieved it, it would be quite a win. The goal was to gain three new clients through networking in a year. To get there I estimated I'd need to do Strategy Sessions with six qualified prospects over the course of the year and close 50% of them. To get those Strategy Sessions I'd have to meet with a lot of people and be referred to at least a dozen of them. And to get those referrals I'd need to connect with about 50 members of BNC.

At our next meeting MC explained that virtually nobody had a networking plan like this. "As I've said many times, almost everyone does marketing randomly. They go to meetings, talk to people and exchange cards, but they don't follow through because they have no aim or game plan. Then networking becomes not much more than a social activity that can take years to build business results or no results at all. But your plan is simple. Meeting with 50 members over a year is only one a week. Those could be phone or sit-down meetings. All of them will end up understanding your business better than almost any other member's."

Social Media and List Building

He went on to explain the role of social media and list-building.

"Social media has become a marketing craze. The game is to get as many followers or friends as humanly possible and then bombard them with quotes, ideas, links, videos and pictures in a never-ending stream. The idea is to get so much visibility and give so much value that sooner or later someone will contact you to do business with you. I know some people who spend hours every week friending new people on Facebook and following endless people on Twitter.

"If you understand the principles of Marketing Ball it becomes obvious that this is a colossal waste of time and energy. When you ask to friend someone or follow someone, the attention value is almost nil. Sure, you have an affiliation through that social network, but since there are millions of members, the affiliation is extremely weak. You don't really know these people and they don't know you, so no matter how much you post, the familiarity and information has little impact.

"So are you saying that social networking is a waste of time?" I said.

"Not if you do it right, "said MC. "And that means connecting with the right people and allocating only a small amount of time to it. Social media can be a supplemental promotional vehicle that builds on your other marketing efforts. Let me explain how to integrate it into live networking.

"When you meet with someone in your networking group, ask them if they are on social media. If yes, then by all means friend and follow them. Because you've met them in person and will continue to see them in person, the social media connection can raise your profile, visibility and value. In addition, take a look at their LinkedIn profile and ask them to join your network. That's all you need to worry about right now. Again, don't put a lot of time into this. Later I'll explain a few other ways you can use social media in keep-in-touch marketing.

"What's more important than building your social network is building your e-list. Your e-list is a list of those who have opted-in to receive information from you. Ultimately your e-list can become your most powerful marketing tool. In my opinion, one person on your e-list is more important than 100 people in your social media networks. Later on I'll explain at length how to leverage this list, but right now you want to start building it, and networking is a good way to do that.

"An e-list is a collection of names and emails in an online database who have given you permission to send them email, usually in the form of an email newsletter or e-zine. I'm sure you get several of them. You collect subscribers to your list in two main ways – through your website and through in-person connections. Now that you're close to completing your website, you want to make sure it's optimized to get visitors to request your report. As I said before, you want links on your home page that point visitors to a free stuff page and sign-up form to request the report. When they do that they will also be opting in to your e-list. Over time, the more site visitors you have, the more subscribers you'll get.

"And you can also get subscribers when you ask to send your report to those you meet through networking. You can say, 'Is it alright to also add you to my e-list? I send out occasional ideas and articles about management and leadership.' If they say yes, just put their name and email into the web form on your site and they'll get the report and be added to the list. If they say no, no problem. Just send them the report by email. Like everything else in marketing, you need a goal, a plan, and a process.

Never having done this before I wasn't sure what was realistic. "How many names should I try to add to my list every month?"

"Go for about 50 to 100," said MC. That might even be a stretch, but make it a habit to mention this to almost everyone you meet. Remember, they'll immediately get your report, which is the short-term goal. As you build your e-list I'll show you ways to leverage that list to get real marketing results."

Part of me wanted to jump into social media and list-building with both feet, but he warned me to start slow, create repeatable systems and then build momentum with those systems.

"These things take time to produce results, so it's more important that you build a habit of adding names to your lists. And don't waste your time adding the names of strangers or from your networking organization's directory. That will just backfire on you. Remember Marketing Ball: Affiliation – Attention – Information – Familiarity. You've got to take this on faith for now. As your list grows, you'll discover the magic of building relationships this way. Later on you'll see the power of this in every area of your marketing."

Marketing Ball Prospect Tracking Program

"Before we end this session I have one more thing to show you," said MC. "And that's your prospect database and tracking system. This is a computer program and app I developed that lets you track all those prospects who have entered your Marketing Ball game. Let me show it to you."

MC, opened up his website, clicked on a link and entered a password. A page popped up showing the Marketing Ball Model. "In the program I have the names of hundreds of prospects. And they are all categorized by the base and position they're on in the Marketing Ball Game. Here's how it works:"

He clicked on the first base icon and a new page opened with a long list of people. "These are all the people I've gotten as far as first base." Then he clicked on one of the names in the list and a separate record for that prospect popped up. "This record gives me information on this prospect, when he was entered into the database, and notes about every contact I've had with him."

I could also see on this prospect record that he had gotten up to Familiarity and Information on the baseline towards second base. Finally, he clicked on the word 'Information' in a list below the prospect's record and some text opened up. “This is a concise tutorial on what you need to do next once a prospect is on this position. With this program you can find out where all your prospects are in the Marketing Ball game and then get ideas about what to do next to move each prospect to the next position or base. It makes Marketing Ball interactive.”

After looking around for a few minutes and trying it for myself, I said, “Uh, is this something that you have available for your clients?”

“Of course,” said MC. “Now that you’ve started networking, it’s time to add all your contacts to this program. It’s a simple but powerful way to keep track of all your prospects. Note that this is very different than your e-list. You really can’t track people on your e-list, because after awhile you’ll have too many to follow. But with this program, you’ll be very selective about who you add. It won’t be everyone you meet; only those who you feel have real potential to become clients. You can also enter good referral sources to this list as you’ll take them around Marketing Ball as well. I’ll give you a password for your own account and you can start using it immediately.”

This was something I didn’t expect. Not only did I have the Marketing Ball System to market more effectively, I now had an online tool to keep track of every prospect in the game. I felt my motivation jump about five levels. Marketing was getting more fun. Who’d a thunk it?

Networking in Action

Before long my networking was in fourth gear. I was attending Wednesday morning meetings and the occasional evening mixers and lunches at BNC. I was doing my best to have substantive conversations with everyone I met. Mostly I focused on learning about them and their businesses in our first conversation. I’d send the most promising connections a copy of my report and added them to my e-list. Then I’d follow up with at least one a week by phone or email to arrange a get-together. Luckily the group encouraged such meetings; in fact, it was written into their purpose and mission statement, so there was very little resistance.

Not long after joining I learned that not only had MC been a member of BNC, he had been a past president. I wondered why he hadn't told me that. I made a note to ask him.

"I didn't tell you I'd been involved with BNC because I wanted you to find them for yourself. I gave you the criteria for the ideal networking group and then let you do your own research. I've been a member for several years, in fact, I'm a co-founder. I still attend meetings occasionally, but so much business comes to me from other sources that I attend less often. Still, it's a strong network for me."

I couldn't help asking, "I wonder if you'd come with me someday and introduce me to some of the members?"

"Almost all of my local clients are also members," he said, "So I get asked this all the time. By the way, you'll discover who they are soon enough. They're the ones who actually listen when you talk!" he said smiling. "Every year BNC has a special Awards Banquet and I invite my clients to attend with me. You'll get an invitation as well and I'll make sure you meet some of my friends who could use your services."

I'd never really thought of MC as a referral source, but it made sense. MC didn't just teach this stuff, he practiced what he preached. Knowing his background in BNC made me even more enthusiastic to stay involved.

"By the way," MC said, "It's not only important to meet and listen to other members, but to do whatever you can to provide leads yourself. It's not a requirement of membership, but it's something almost everyone does. As you get to know people better and as you expand your contacts, you'll find this happens naturally.

Over the months, and ultimately years, that I belonged to BNC I made many good connections, and received some excellent leads and introductions. The time I spent networking paid off in the short term, but especially for the long term. I gained a reputation as an Independent Professional who delivered what he promised, and my success grew. BNC also became the focus of an especially effective marketing plan that I'll talk about later.

However, the next marketing strategy MC taught me not only supported my networking, it took me in directions I hadn't even imagined.

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Keep in Touch Marketing

About a month after joining BNC I met with MC to learn about the next marketing strategy. In the back of my mind I was wondering how I could handle anything more and, I told him so.

Super-Effort

"I haven't talked to you about super-effort yet, have I?" said MC. "Well, this is a perfect time to discuss it. One of my early teachers taught me the value of super-effort. Super-effort might be defined as 'a sustained effort towards a goal that is outside your comfort zone.' Almost everyone makes ordinary efforts most of the time. But a super-effort is like studying intensively for months, as my son did, for the bar exam. It's going beyond the extra mile in a client project. Super-effort is required to produce a result in these cases because there is little momentum to carry things along by themselves. Learning and implementing marketing strategies is like that for the first year or so. Ordinary effort won't generate enough momentum to take you where you want to go.

"Sure, you could make ordinary efforts in your first year of learning and implementing marketing. But it wouldn't get you very far. In learning all these marketing principles and practices, it may seem a little overwhelming, but as you learn, things will come faster and easier. And as you get some momentum in one area, you can use that momentum to work on the next area. Before long, all your marketing activities become integrated and you start to experience marketing synergy where all your efforts added together are greater than the sum of the parts.

"Nobody ever died of making super-efforts. And I wouldn't give you more to do unless I thought you could handle it. Remember, you're setting the marketing foundation for your whole career. These efforts will ultimately help you generate millions of dollars in income, not to mention the difference you'll make in thousands of lives. Also remember that not everyone who applies to work with me gets accepted. I only choose those who I determine have the capacity to do great things, to make super-efforts. And you're one of those people."

What could I say to that? Whatever he had in store for me next was no doubt going to be useful in my marketing evolution. And for someone who taught me to even make networking fun, how hard could it be?

Keep-in-Touch Marketing

"The next, and perhaps the most important marketing strategy, is Keep-in-Touch Marketing. These are marketing activities that consistently keep your name, message and value in front of your prospects. This one strategy is responsible for a large part of my success, and I use keep-in-touch marketing as the cornerstone of all my marketing efforts. Right now I keep in touch with close to 40,000 people every single week."

He let that sink in for a few moments and then continued. "That's how many people I now have on my e-list. I send them my e-zine once a week and I also promote various programs and products through that list. But of course, I didn't start with 40,000 names and neither will you."

"Let me start with the big picture and the story of how I started. In one of the earliest marketing books I read, I learned the importance of keep-in-touch marketing. This was before the Internet, even before email. So keep-in-touch marketing meant newsletters and other mailings. I worked at building a mailing list just as you're now building your e-list. I gathered cards at networking meetings, compiled likely prospects from the Chamber of Commerce directory and spent hours entering them into my database. I think the biggest it ever got was about 600 people, but boy, was it effective.

"I put out a one-page newsletter six times a year and also did postcard mailings to invite people to events. I made sure people didn't forget who I was, the work I did or the results I produced for my clients. And it worked. It resulted in new clients, filling workshops, and a reputation as an excellent marketer.

"Some years later when the Internet got rolling, around 1996, I put up my first website and shifted to building my e-list instead of my database. And then in 1997 I did something I didn't know was impossible," he laughed. "I started to write and send out my e-zine (email newsletter) once a week, and I've been sending it out ever since. Because e-zines were relatively new back then, my list grew like mad. I was adding over a thousand new subscribers a month, mostly due to word-of-mouth. This attracted even more clients and filled more programs and workshops.

"On the face of it, keep-in-touch marketing is pretty simple: Build your list, write content and send to your list, repeat for the life of your business. Now what we're going to do is build a step-by-step, keep-in-touch marketing action plan that will work for you. Are you ready?"

"I'm game," I said. What else could I say?

The Keep-in-Touch Marketing Plan

"OK, first we'll create a marketing action plan chart as we did for your initial plan for connection to past clients. There are a lot more steps to this plan, so a written plan like this is really useful to keep track of all the steps. We didn't do this for networking because the steps were pretty straightforward and simple."

MC showed me a completed keep-in-touch plan that he had clearly put a lot of work into. "This is my generic keep-in-touch plan. Later you can customize it for yourself."

Name of Plan: Keep-in-Touch e-zine Marketing Plan			
Services Offered: All services and programs			
Target Market: Companies from $50MM to $500MM			
Marketing Objective: Subscribers sign up for services & programs			
Date	**Action Item**	**Communication**	**Mindset**
	1. Write report to give away on your site.	Write report. Put it into PDF format.	
	2. E-list sign-up on web page.	Write sign-up page.	
	3. Set up e-list manager.		
	4. Write confirmation email to send to new subscribers.	Write confirmation email.	
	5. Create e-list confirmation web page.	Write confirmation web page.	
	6. Design and test e-zine template.		

	7. Include some promotion in e-zine.	Write promotional text.	
	8. Write and send your first e-zine.	Write e-zine article.	
	9. Schedule e-zine regularly.	Write more e-zine articles.	
	10. Send stand-alone emails to your list.	Write promotions.	

"In the first column you'll put in dates; in the second column are your action items in chronological order; in the third column are the specific communications you need to write, and in the fourth column you'll put in mindsets that might hinder you from carrying out that step. We didn't include anything in that column in your first plan as we hadn't explored mindsets yet, so let's talk about that first.

"It's important to remember that a constrictive mindset can arise for any reason at anytime. But mostly they are triggered by things we consider to be stressful. For some, writing is stressful, for others, computer technology is stressful, and for others, just following a plan is stressful! Remember, none of these are inherently stressful. So we've created a space for each action item where you can write in your stressful thought, or image if you have one.

"For instance, for many people, writing the e-zine article is the most stressful part of this process. So it's useful to notice that and acknowledge your stressful thoughts about writing. Remember, that's the first step of the Getting Unstuck Process. You can't get unstuck from something until you've identified what it is. Common stressful thoughts about writing include:

- I don't know what to write
- I don't know how to write
- I can't send it out unless it's perfect
- People will think I'm a know-it-all
- People will think I'm stupid
- It takes too long to write an article
- What if I run out of ides?

"I could go on an on," said MC. "Do you recognize any of these for yourself?"

"At one time or another I've experienced all of these, but the one about running out of ideas is the big one for me. I know I can write an article as I'm a decent writer, but I still get stuck… that perfectionism thing is a bit of an issue. So those are two things that would definitely stop me, running out of ideas and perfectionism in my writing."

"OK, there are a few ways to handle these. The first is just thinking through these and getting a little coaching and input on them. That's often enough to get you unstuck. But if you get really stuck, then you can do the four questions and the turnaround. As you can see, the steps in this plan are pretty straightforward. They are small, manageable steps. Nevertheless, any step has the potential to trigger some degree of stuckness. Then a perfectly doable plan gets hijacked and isn't completed. Of course, that's never happened to you!"

Areas of Stuckness

"Yeah, right. It happens all the time. So many projects I've started have never come to fruition. But I've never considered that I might have multiple areas of stuckness in one project. By breaking it down like this I have a tool to recognize the stuckness, resolve it and move on. So while we're at it, can we talk about my two areas of stuckness in writing an e-zine?"

"Sure. These are very common ones. We all have some ideas, but will we have enough to send out relevant material to our list for years? The thing I've noticed is that the more I write, the more ideas I get, not less. You see, one article brings in a lot of ideas and then any one of those ideas might be a new potential article. But one way to start with this is to write down a list of every problem or mistake your clients have experienced. How many do you think you can come up with?

I thought for a moment and then smiled. "At least 100," I said. "Easily that number. There are some central ones that I wrote about in my report, but there are dozens that branch off from those."

"Yes, this is true for almost anyone. You've been in business for almost four years. In that time you've seen enough client problems to come up with ideas to write about for years. Now how about the second one, perfectionism? How much does that stop you?"

"Well, sometimes it paralyzes me," I said. "I start to write and then I'm not happy with a sentence and I'll go over it five or ten times before I continue. I just don't feel I'm saying it as well as I could. So it can take me a long time to do writing, and even when it's done, I don't feel it's as good as it could be."

"This is also very common. I've worked with hundreds of clients with just this issue. First of all, it's important to know that there's no such thing as perfection. You could take an article, give it to ten editors and they'd all make different changes. And it could literally go on forever. You can aim for good, for clarity, even for excellence, but forget about perfection.

"The other key is to write your article in one sitting with no edits. Just let it flow. Now you do need to know your topic and you might have some ideas going in, but it doesn't need to be completely planned out. Just write, the faster the better.

"And then only when you've written your first draft do you go back and edit. Start from the top and work your way to the bottom, correcting errors, changing the structure on a few sentences, moving things around. In my writing I might do this two or three times before I'm satisfied. Finally, read the complete article out loud to yourself. It's common to catch awkward sentences by doing this. And you're done.

"One final step, especially if your writing is rusty, is to have a copy editor go over your article and make changes. They'll find grammatical errors, sentences that can be tighter and "wordies" – words missed in the spell checker such as 'there' when it should be 'their.' You'll also learn from an editor and your writing will improve.

"Those writing tips should handle most cases of perfectionism. But again, if you just can't finish your article or are afraid to send it out, then you may need to explore your underlying beliefs.

"There was one client I worked with years ago who had a perfectionism issue. She was a smart and capable coach who could never complete anything she wrote. Ultimately we discovered a hidden underlying belief: 'If I'm successful at my writing, I'll go blind.' Where the hell did that come from? Well, it turns out her grandfather was a writer and he eventually went blind. Of course, they weren't connected. My client was quite young when this happened and it had a profound, yet unconscious impact on her. Just the thought of writing made her vision go blurry. But once we uncovered this belief and worked on it, writing was no longer an issue for her. In fact, she's written two books since.

"Constrictive mindsets are no small thing. They can hold you back in areas that seem like no big deal. By doing a complete marketing action plan that includes the mindset column, you can recognize these thoughts before you even begin and then knock them off one at a time.

"But now let's get back to more mundane things, the many steps in this plan. I want to make sure you're clear about each one of them and know what to do next."

The E-zine Template

"The good news is that you've already done the first five things on your plan. You've written your article, put your sign-up page on your web site, set up your e-list manager and written both your confirmation web page where people will be directed when they sign up, and your confirmation email. With all of that in place, all you need to do is set up your e-zine template and start writing. Let's talk about your e-zine template first.

"The purpose of your e-zine template is to have a simple format that's the same for each e-zine. All you need to do is open up the text file of your last e-zine, do a 'save-as' and continue with your next issue using the same format. This is if you do a text e-zine. Html e-zines are a little trickier. Let's look at the elements of your template.

"First is the header and masthead. This would include the title of your e-zine, who's it's from, etc. Let me show you mine:

> In This Week's Issue: What are you planning to do during the
> "dead zone" between Christmas and New Year's?
>
> MC's E-Zine
> Marketing for professionals who are
> committed to making a difference.
>
> from MC, the Marketing Coach
>
> If you're a new subscriber to my e-zine - Welcome!
> Please pass on this e-zine to those in your network.
> To leave list or change email address, scroll to bottom.
>
> Word count for this week's article: 786
> Approximate time to read: About 3.1 minutes
>
> If you want to see this email on a website, instead of as
> plain text, just go to the More Clients Blog:
>
> http://www.mcmarketing.com/blog

"I put the teaser for the topic at the top to encourage people to read further.

Then my tag line and who it's from. The next three lines welcomes new clients, encourages subscribers to pass it along and let them know how to make changes to their subscription. People really like the feature of the word count and how many minutes it takes to read. I've figured that the average reading speed to be about 250 words per minute and calculate the reading time from that.

"Finally, I direct them to the e-zine on my blog if they'd rather read it online in a somewhat more attractive format. What follows is your article for that issue. And then after the article I'll typically post some promotional materials, how to unsubscribe, etc. The idea is to make every issue uniform, easy to read and user-friendly.

"Because I send this in text format, I have fewer technical problems, but there are two things I always adhere to. I keep my lines no wider than 65 characters and my paragraphs no deeper than 7 lines. By keeping your width narrow, you won't have problems with paragraphs wrapping incorrectly, and by keeping your paragraphs to 7 lines or less you improve readership. Very short paragraphs, even one sentence paragraphs, are fine for an e-zine article.

"I try to keep my articles in the range of about 750 words which can be read in about three minutes. The biggest challenge with e-zines is people get so much email these days that they want their content focused and relevant. You want to keep your articles to one core idea. Let me show you my favorite structure for an e-zine article. The key, again, is Marketing Syntax.

1. Open up with a paragraph or two of a problem or issue.

2. Talk about what's possible if that issue is resolved.

3. Give a list of five to ten things that will help solve that issue.

4. Wrap things up and make a call-to-action.

"This structure is easy to read and understand and gives immediate value to the reader in a nutshell format. Your call-to-action is usually no more than a suggestion of where to start or what to do next. Remember, the purpose of your e-zine article is not to sell. It's to educate, to build familiarity, and provide information. And ultimately that creates the know-like-trust factor.

"After the article I'll often include a short promotional blurb about some program or service I'm offering right now that includes a few paragraphs of low-key promotional copy and a call-to-action with a link to a page on your website.

"Let me add one thing about blogs before we wrap up. You already have a blog page on your website and you had a number of older blog posts up there. I've noticed you've added a few posts since you launched your new site. For right now what I recommend is that you also post your e-zine articles on your blog, in addition to sending them out by email. One extra thing you can do is click on the social media links at the bottom of your blog and announce your e-zine/blog post on Facebook and Twitter. Only takes a few seconds and it gives you a little more visibility.

"The final thing is for you to put action dates on your plan and make a commitment to write your first e-zine article and send it out. By the way, how many subscribers do you have now?"

"I have about a hundred. I started with my past clients and asked them to join when I connected with them. Then I sent an email to everyone in my address book. A few people I've added through networking, and the rest came from visitors to my site. So it's not much of a list yet but I feel I've got some momentum.

"But I do have a few other questions. The first is about text vs. html email. I get some of both. Which do you think is better?"

"RJ, I've been using text email for 15 years and as they say, old habits die hard! I find text much easier to prepare to send out and I have very few technical problems, none in fact. But html email, although trickier technically, can look much more attractive. You can put in a graphic header, format the text, add images, etc. Tests have shown that html email gets higher readership overall. What I recommend is starting with text email so you can get rolling right away and then explore html a little later. Your web designer also has experience in setting up e-zine templates in html. And your next question?"

"Other than a regular e-zine do you recommend sending out other emails to this list? I know you do that as I get them occasionally when you're promoting a specific program online."

"This can be one of your best promotional strategies and I recommend it highly. Right now I have a number of programs and products I've developed that I promote online and through my e-list. They bring me about half of my income. But I make sure not to bombard my list and do my best to keep it to no more than an extra email per week, often less, rarely more. But since you don't have a product or program to offer the general public yet, I'd limit your stand-alone email broadcasts to two areas:

1. Invitations to take advantage of a Strategy Session. Once you've built up your list and people have been getting your e-zine for awhile, an occasional announcement to offer a Strategy Session can work quite well. I'll give you a sample email for this later that you can adapt for your business.

2. Announcements of talks, teleclasses or webinars. Again, as your e-list grows, it can be the most effective way to promote these. More about this soon.

Committing to Action

After answering my questions, MC returned to the plan for my e-zine. "Your e-list will start to grow faster as a result of all the marketing activities you'll be doing. The bigger the list, the more leverage you have. So again, when's the first edition of your e-zine going out?"

Boy, it was easy to avoid that question, but MC had taken away all my excuses. He had a talent for doing that! "How about next Tuesday?" I said.

"Sounds good to me. Since you've designated Mondays as days without clients, you can write and set it up on Monday and queue it up in your e-list manager to go out early Tuesday morning. The final question, how often do you want to do it?"

I would have loved to impress MC and say I'd send it weekly as he did, but I wasn't ready for that and thought it might be overkill for my kind of business. "I'd like to do it once a month," I said. "That I think I can handle without a problem," I said confidently.

"Perfect!" exclaimed MC. "Sounds just right for your business. And remember, I'm happy to take a look at it before you send it out. I want to give you a month or two to integrate networking, list building, and your e-zine into your regular marketing activities. And then we'll talk about the marketing strategy that's better at getting clients more quickly than any other."

Over the next month, that's exactly what I did. My first step was to create a list of topics for my e-zine and I came up with twenty pretty quickly. I prioritized them and ended up with a solid list of twelve topics, a whole year's worth. My first topic was "Getting Control of Your Business – Myth or Reality?"

It's funny that I had agonized for so long about writing an e-zine, but now that I had a simple system and had worked through all my constrictive mindsets, it came naturally and easily. By the second issue I felt like an old pro. In addition, I started to write shorter blog posts about once a week with ideas and reflections on leadership and getting control of your business. Within a few months my e-list had climbed to about 750, faster than I expected. In my next meeting with MC we talked about a completely different marketing strategy, one that would have major repercussions for my business for years to come.

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Speaking, TeleClasses & Webinars

"Last time we talked I mentioned that the next marketing strategy was better at attracting new clients more quickly than any other strategy," MC began. "Let me tell you a story about that first. It was about 18 years ago and I'd just moved my business from the city to a suburb about 90 minutes away. My business had experienced some success in the city but after I moved, my client base started to dry up. Nobody wanted to drive 90 minutes to meet with me and I hadn't started phone coaching yet. I had just met my wife to be and was close to flat broke within six months of moving. Rather embarrassing as a marketing coach!"

Marketing Synergy

"I decided it was time to get moving with my marketing again and created a plan to implement a marketing strategy I had used so many times before in the city. Within six months of implementing this plan I had attracted 26 new clients. That's one a week. And I still use variations on this strategy when I want to attract clients quickly."

MC paused, waiting for me to speak or ask a question.

"OK, I give, what was the strategy?"

"It was speaking," said MC. "Mostly giving talks to various professional groups and chambers of commerce. I gave talks, collected cards, followed up, set up meetings and turned one out of four of those I followed up with into paying clients. And back then I really hadn't refined my follow-up skills and

Strategy Sessions. When I use this strategy now, my close rate is about 70% of those who express interest in my services after the talk.

“By the way,” added MC, “Talks and presentations are the ultimate marketing strategy for giving prospects an experience of you. They also build familiarity just by the fact that they get to see you in person. And of course, any talk provides the kind of information they want. After all, they showed up for the talk to learn from you. Talks are marketing synergy in action. Done right, they can move a prospect from affiliation to second base in an hour or two. And remember, second base is you prime marketing objective.”

Another pause. My mind stated to calculate. If I could do one or two talks a month, get three or four of the participants to meet with me for a Strategy Session and close just 50% of them, I could easily get a new client or two every month. But my results in the past hadn’t been anywhere near this. Was this really possible? I started to ask MC some questions.

“That sounds great; it all makes sense. I know you were able to do that, but are those figures realistic for me? In the past I’ve found it hard to get talks, even harder for participants to give me their contact information and nearly impossible to generate anything from my follow-up efforts. I don’t want to put in a huge amount of time and effort into giving talks if it doesn’t get me results.”

“Oh, ye of little faith,” said MC, smiling. “I don’t teach marketing strategies that don’t work. I’ve refined this process over the years and made it a step-by-step process that almost anyone can follow and succeed with. It starts by being able to give a good talk with compelling content. You can do that, right?”

“Definitely. I don’t think there’s a problem with my ability to give a good talk; I’ve gotten very good feedback in that area. It’s all the other steps I’m doubtful about.”

“Another thing, RJ, when I used that speaking marketing action plan years ago I was much less advanced in my skills than you are now. I’m more than confident you can do as well or better."

A Speaking Action Plan

"Let me dispel your doubts by showing you a speaking marketing action plan. I've already laid one out for you that includes all the step-by-step actions. Let's take a look:

Name of Plan: Speaking Marketing Plan			
Services Offered: All services and programs			
Target Market: Companies from $50MM to $500MM			
Marketing Objective: Participants sign up for Strategy Sessions			
Date	**Action Item**	**Communication**	**Mindset**
	1. Come up with topic for talk.	Write topic.	
	2. Research places to speak. Make a list.		
	3. Develop materials to send to meeting planner.	Write speaker's kit – PDF or website.	
	4. Prepare to contact organizations/planners.	Write phone script.	
	5. Start contacting organizations and		

	booking talks.		
	6. Contact X organizations.		
	7. Book 25% of calls to organizations into talks - X talks total in a year.		
	8. Prepare your talk and PowerPoint	Talk outline and PowerPoints	
	9. Design feedback form.	Feedback form.	
	9. Give you talks.		
	10. Get cards for report and e-list.	Card Script.	
	11. Get feedback form with Strategy Session request.	Strategy Session Script.	
	12. Make follow up calls to those requesting Strategy Sessions and convert 50% into actual Strategy Sessions = X Strategy Sessions.	Follow-up call script.	

	13. X solid Strategy Sessions with qualified prospects, assuming a 50% close rate.		
	14. Sell X HEOB Programs at $50K each = $XXXK income/yr.		

"Your speaking marketing action plan is fourteen steps with 10 communication pieces to develop, mostly scripts. Sounds like a lot, but again, you work on these one step at a time. And I'll also go over the scripting with you today. All you need to do is fine-tune your scripting, do a little practice and you're all set.

"Don't forget the mindsets," I said.

"OK," said MC, "let's handle those first. Just go down the list and tell me your thoughts for each one."

"Let's see, Research Places to speak – 'I'll never find places to speak.' Put Together Speaker's Kit – 'don't know what needs to go in the kit.' No problem with phone scripting anymore. The talk itself and PowerPoints, no problem. Ah, these next two – Collecting Cards Script and Strategy Session Script to do at the end of the talk – 'no clue how to do those.' Finally, the follow-up calls – 'nobody will take my calls!'"

"That's all? Said MC. "Piece of cake. See how when you break this down it becomes manageable? Let's go through all of these one step at a time:

Title of Talk – "I assume it will have something to do with getting control of your business, right?"

"Yes, and I think I want to focus on the leadership part of that."

Speaker's Kit – "This includes four things – a cover letter making a request to speak at the organization. Give a quick overview, benefits, and some credentials. Then you want a talk write-up of about 250 words. Use Marketing Syntax, of course, with several bullet points outlining the benefits. Then a short bio, again about 250 words. Let's also add some testimonial quotes from your clients. Lay it out nicely in Word and turn it into a PDF and you're ready. I'll give you a sample.

Phone Script to Organizations – "Remember, when you're calling organizations to find talks, it's not a hard call. Organizations are looking for speakers. You just want to find the right person, perhaps the program coordinator, and let them know what your talk is about. Something like:

> "Hi this is RJ, I'm a leadership consultant and coach. I give a talk I thought your organization might be interested in called, 'Seven Leadership Skills to Win Back Control of your Company.' Is this a topic you think your group might be interested in?"

"You'll usually get a no or a maybe. 'No,' if this just isn't the type of talk for their group and 'maybe' if they want to know more. Offer to send your speaker's package – by email or mail, their preference. That's it. Then follow up to see if they have any questions and keep following up until they book you or decline you. This takes some time and persistence, but it's not hard.

The Talk Itself – "Again, remember Marketing Syntax, just like your e-zine articles, only in more depth. Open with a problem, follow with a desired outcome, and then present your seven leadership skills, ideally with brief case studies. Wrap up with an optimistic conclusion and call to action.

Collecting Cards and Strategy Session Script – "You need to remember that this is why you came – to identify some prospects. So it's important that you don't rush this part. Give yourself a few minutes at the end. The following script is tested and foolproof it you follow it to the letter:

> "Thank you very much. Before I wrap up today, I want to give you

> something. I'd like to give you a copy of the PowerPoints and a copy of my report, 'The Seven Strategies of Leadership to Win Back Control of Your Company.'"
>
> Then, and this is *the* key. Hold up a printed copy of the PowerPoint pages and the report high into the air and say, "Who would like a printed copy of these?" Wait for a show of hands, and most, in my experience, will show their hands. And then say, "OK, what I'd like you to do is take out your business cards now. Please take a look and make sure your most current email address is on the card. If not, just write it in now." You'd be surprised how many people carry around outdated business cards.
>
> Then say, "Now please just hand your cards in to the center aisle and I'll have someone in the back collect your cards." Good idea if you set this up with the coordinator for your talk ahead of time.

"Next is your Strategy Session script. What I recommend is putting together a feedback form. The easiest way is to put a copy under each chair before the talk. Copy it in a color so it stands out. Then after all the cards are in, say the following:

> "Thank you, I'll send out your PowerPoints and Reports in a few days by email. Now one more thing. Can you please reach under your chair and pick up the blue sheet? There's just a few things to fill out. It will take only a minute. First, put in your name and your email address at the top. Then please quickly score this talk by giving me a score from 0 to 5 in the two categories – Value of the talk and quality of the presentation. Next, if you know of another organization who might appreciate this talk, just check the next box.
>
> "Finally, I'd like to offer you one more thing. Again, I'd like to get a show of hands. Who here is totally committed to improving their company's leadership and getting control of your company in the upcoming year?" Wait for a show of hands. You probably won't get as many hands. "OK, great. What I offer after every talk I give is up to 10 'Leadership Strategy Sessions'. This is an individual meeting by phone with me that explores your current leadership, goals and challenges. This session is valued at

> $375 and I can't offer it to everyone. But if you'd like to take advantage of that session, just check the box by Leadership Strategy Session and in a few days I'll contact you by email and set this session up with you. OK, is that clear to everyone? Great, now just hand in your completed blue sheet to the center aisle and we'll collect them. Thank you so much for attending the talk today!"

"A script like this is very effective and it doesn't sound like a sales pitch. Program organizers don't want you to pitch your services at your talk, but giving away the PowerPoints and report are seen as extra value, as is the offer for a Strategy Session. Not only that, you may get some leads for other talks.

Follow-Up Calls – "These are just like your follow-up calls to your warm connections. You want to follow up in a day or two, never more than a week. And remember, they have asked for a Strategy Session so all you're doing is calling to confirm the session.

"I have no doubt I can do all of this," I said. "The scripting for the report and Strategy Session were brilliant. This is so far beyond what I've ever done. I usually just say thank you and end. No wonder I didn't get many results from speaking. I was hoping they'd call me back after the talks I gave. But there's still something you didn't cover and that's how to find places to speak."

Where to Speak

"Yes, this can be a real challenge, but it shouldn't stop you," said MC. "For some businesses there are more opportunities to speak, for others, less. For instance, there are more venues to give talks to Independent Professionals on how to attract clients than there are places to speak to business executives who need help with their leadership. The smaller the businesses, the bigger the audience, and visa, versa.

"However, we live in a very large metropolitan area and there are more business groups and conferences than you realize. Start with a Google search with keywords such as leadership conference, business conference, and the city name. Ask all your clients where they go to conferences. Many won't go to local groups but will often attend industry conferences. Ask everyone in BNC if they know of places to speak, both locally and nationally. Contact the local Visitors and Convention Bureau that has lists of upcoming conferences scheduled out a year or more.

"Ultimately you'll find some good places to speak. In some cases your speaker's kit will do. In many cases there's an online application process. Like anything else, this takes time and persistence. Something you might want to consider is hiring a virtual assistant to do the initial research and calls for you. This is one marketing activity that makes sense to delegate. I can give you a referral to someone who's an ace at this.

"Also understand that most of these speaking opportunities are unpaid. In some cases they'll pay for your transportation and lodging. And if you're lucky, there are some conferences that pay a speaker's fee, but usually not until you've gained a reputation or have authored a book."

"You're not going to tell me in the next session that I need to write a book, are you?" I said laughing. "I wouldn't put it past you, super-effort and all that!"

"At some point you should write a book. Maybe in a year or two. I know you're one of the best in your field. Again, when you have a strategy, a plan and a step-by-step process, it's just a matter of writing one chapter at a time. Many of my clients have written books; in fact, I just got an email today announcing an upcoming publication by one of them. It's something you're completely capable of doing."

Teleclasses and Webinars

"OK, a year it is. But can we also talk about teleclasses and webinars?"

"You might say a teleclass is simply a talk over a conference line without PowerPoints. I've done a whole lot of these very successfully. A webinar is doing a talk by conference line but with PowerPoints. In so many respects, teleclasses and webinars are not much different than live presentations. You can host them yourself as you grow your e-list. I'd recommend having at least 2,000 subscribers before you start. In addition, many organizations are booking Independent Professionals for both teleclasses and webinars. They are certainly cheaper than putting on a conference or renting a room at a hotel. Many of my clients have done this very successfully.

"If you want to get booked for teleclass or webinar presentations, your outreach method is very much the same – research on the Internet, find the program coordinator and send your materials. Again, a virtual assistant can help you with this. Another good opportunity is university business alumni associations. Many hold regular teleclasses or webinars. Since you went to college here, it shouldn't be too hard to find out what's available."

MC wrapped up the meeting as always: "Let's put some dates on that plan. Tell me when you want to get started and also tell me how many talks you'd like to give in the coming year."

I had given up resisting. Putting together and implementing a speaking plan looked harder than all the other plans, but when I went down all the action steps, none seemed insurmountable. He'd even taken away my biggest objection of finding places to speak. I'd call the virtual assistant and contract with her to make those calls.

My only thought was, "I guess it's really time to start playing marketing ball seriously," and I started putting my plan into motion.

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Playing Marketing Ball

I was really only at the beginning stages of marketing ball, yet had four solid strategies either in action or ready to go: direct outreach, networking, keep-in-touch marketing and speaking. Intertwined with these were list-building, social media and blogging. I was determined not to let the ball drop and find a way to integrate all of these activities on an ongoing basis without them taking all my time.

I had designated Mondays as 'Marketing Mondays' where I'd write my e-zine monthly and my blog on subsequent weeks. My direct outreach plan was winding down, but I was generating a lot of connections through networking, so I dedicated the rest of my Mondays to follow-up calls. I'd focus on client work Tuesdays through Fridays, and since I was less than half booked up, I'd be able to fit in other marketing activities as needed on those days. All I had to do was to get my speaking plan going, and I had some help with that.

I called MC's recommended virtual assistant and arranged a time to speak. I found her sharp, enthusiastic and knowledgeable. She knew most of the opportunities for speaking in my area and was experienced at finding conferences that needed a speaker. We spent some time talking about my CMM and my HEOB program and then we went over a calling script to approach these organizations. Finally, I emailed her my speaker's kit for her to send out. My speaking plan had been to get one good talk a month in the coming year, and she supported that enthusiastically.

"This is great, RJ!" She said. "When you really start marketing seriously, as

MC has taught you, you want to take all that energy and momentum and make a real splash. By doing twelve talks a year, you'll accomplish that. You'll be a known quantity in the area and you'll generate so many leads that you'll be able to be picky about them. This is another key to attracting more of your ideal clients."

I was glad she was aligned with my goals. She told me that she didn't charge by the hour but by the results. "I charge $250 per talk I get you. And if it turns out not to be a good talk for any reason, I refund your fee. Fair enough? One other thing, if I happen to book you for a paid speaking engagement, I charge 25% of the fee."

I agreed, and she planned to start researching and calling the following week. She would handle everything, reach the organizations, send out my materials and book the talks. What a relief. Too bad she couldn't do my follow-up calls for me!

Next I put my attention on what only I could do, the networking and follow-up activities. I took a closer look at the Marketing Ball model and applied it to the connections I was making.

Upping the Game

Everyone I met at BNC I already had an affiliation with, but I hadn't met many of them and gotten their attention with my CMM, let alone given them my article. My plan was to meet with 50 of them through in-person meetings throughout the year, and that was going well, but I was beginning to get impatient. After all, there were over 300 members in BNC. How could I get more of them up to familiarity, information and experience? I remembered what my new VA had said about energy and momentum. Suddenly an idea came to me.

Perhaps MC could give me some feedback and because of his close association with BNC could tell me if I was on the right track. So I rang him up.

"MC, I'm thinking of putting on my own talk here locally and inviting members of BNC. Is there a way to get their mailing list, and is that kosher?"

"Well, it is kosher under certain conditions. They rent their email list for single time use. I think about a dollar per name. They don't rent their email addresses, however. But you may have noticed announcements of events put on by their members at the bottom of their weekly 'BNC events' email. You can place a small ad in there for about $50. I think it's a good idea. Why don't you put together a letter and a blurb for the email and I'll look it over for you. Don't forget to map out your plan with all the steps and set a date for six weeks to two months from now."

Before I knew it, things were in motion. Here's the MAP I came up with.

<table>
<tr><td colspan="4">Name of Plan: Give a talk and promote it to BNC members</td></tr>
<tr><td colspan="4">Services Offered: Get information into hands of members</td></tr>
<tr><td colspan="4">Target Market: Any and all members of BNC</td></tr>
<tr><td colspan="4">Marketing Objective: Get to familiarity, information & experience</td></tr>
<tr><td>Date</td><td>Action Item</td><td>Communication</td><td>Mindset</td></tr>
<tr><td></td><td>1. Get BNC list for mailing + email blurb.</td><td></td><td></td></tr>
<tr><td></td><td>2. Write invite ltr to BNC members.</td><td>Write letter.</td><td>The letter won't work.</td></tr>
<tr><td></td><td>3. Write email promo.</td><td>Write email.</td><td></td></tr>
<tr><td></td><td>4. Book meeting</td><td></td><td>I won't be able</td></tr>
</table>

	space.		to find a place.
	5. Send out letter and 3 mentions in weekly email.		
	6. Develop and practice talk & PowerPoints.	Develop talk and PowerPoints.	
	7. offer report and get cards after talk.	Practice Card Script.	Nobody will give me their cards.

Despite a few constrictive thoughts, this plan looked almost too simple; seven steps and four communications. First I called BNC and arranged for the mailing list and the email blurb. I gave the BNC staff member my credit card and was about to hang up when she asked if I needed a room for the workshop. They would be happy to rent out their main meeting room at the member's discount. The Saturday morning I wanted was available, so I paid for that too. Two down and five to go. Now, what to write in that letter?

I wanted to make it a very personal letter, be sure I had a good title for the talk and then follow Marketing Syntax. I needed to remember that this talk wasn't for potential clients but for those who could refer me to potential clients. So my angle had to hit the right "what's in it for me?" triggers. This took me a little time, but after a few attempts, this is what I came up with:

> Dear BNC Member,
>
> My name is RJ and I'm a relatively new member of BNC. I'd like to invite you to attend a special complimentary morning workshop that will help you be more in your business.

"Get Control of Your Pricing – Especially in a Down Economy"

When the economy is down, many professionals and small business owners lower their fees. Before long, it feels like you're begging for business. The client is calling the shots and you seem to have no choice.

Unfortunately when you lower your fees you start to lose the respect of your clients and your services may be seen as a commodity where price becomes the most important deciding factor.

The truth is, you should be raising your prices! But the only way to be successful at that is to present your service as a unique solution with measurable, bottom-line outcomes. How to do that is the topic of this 3-hour workshop. You'll come away with the following:

- 3 Specific, proven strategies for raising your rates
- Honing your message to get immediate attention and interest
- How to listen your way into profitable projects
- Proving you are worth way more than you charge

Details of the workshop

Location: BNC main meeting room

Day: Saturday, May 12

Time: 9 am to 12 noon

Refreshments: Complimentary Continental breakfast

Fee: Free to all BNC Members, $49 to non-members

Reservations: Please call or email to reserve your space

I look forward to meeting you at the workshop and sharing these valuable ideas with you.

Sincerely,

RJ

P.S. If you're currently not making the fees you'd like in this economy, I urge you to attend. It could be the most valuable workshop you'll attend this year.

In addition, I put a version of the letter on my website. In the email blurb for the BNC Newsletter I wrote a much shorter write-up with a link to that web page, with a simple email response form for reservations.

An Unexpected Boost

I proudly showed this letter to MC to get his quick feedback. As usual, I got more than I expected.

"The letter is excellent, RJ. And I see you're incorporating some of my ideas into your talk. I don't have a problem with that as long as you've mastered these ideas yourself. Your topic and write-up are perfect; this is the kind of thing people are looking for. But there's one big problem. You've only been a member of BNC for a few months. You've met some people, perhaps only a few dozen know who you are. So it might come across as somewhat presumptuous to do a workshop like this. It's gutsy, though, I'll give you that."

"But that's the whole purpose, to raise my profile, to gain more familiarity, to provide information and to give them an experience as you taught me in Marketing Ball. Do you really think this won't work?"

"Oh, sure it will work, but not to the level you want. You'll get some people to come and it will get the kind of results you want with those people. But wouldn't you rather fill the room?"

"Of course, I would, but how do I do that?"

"Simple," said MC. "I'll send the letter on *my* letterhead. The letter will be from me, not from you. All we need to do is change the introduction a little."

"Wow, I had never considered anything like that. I can see that if it came from you, it would definitely get more response. But I have a question, why would you do that for me? Have you done that with other clients?" There had to be a catch, I thought.

"I've done it for a few. I've let my clients borrow my credibility to make connections to a particular marketplace, such as BNC or other business networks I have long-standing connections with. The reason I'm doing it for you is because of your initiative. I taught you certain marketing principles and practices and you've worked hard to put them into action. But you didn't just leave it at that, you decided to step even further out of your comfort zone. How can I not reward that kind of behavior?" MC smiled.

"Well, if you're willing to give me that kind of assistance, I'll work at doing an even better job. Let's try to fill that room. I think it will hold about 150, right?"

"Even better, let's have so much demand that we have a waiting list!" exclaimed MC, "We can have the talk recorded and you can send it to those who missed the live presentation. In addition, we should have a poster and flyers made and place them in the BNC lobby. They'll be happy to do that since you're renting the meeting room. And I'll make a few calls to some of the board members and have them talk it up."

It was clear that MC loved doing promotions like this as much, if not more than his marketing coaching. And what a partner to have. Not only would this event be a success, I'd learn a whole lot about how to promote and conduct promotional workshops like this. To say I was excited was a big understatement.

The first thing for MC to do was to change the introduction on the letter. This is what he wrote:

> Dear BNC Member,
>
> As one of the founding members of BNC, I occasionally sponsor an event or workshop that I think will be particularly valuable to BNC members. The workshop will be conducted by a talented management consultant and coach named RJ, also a member of BNC. I've worked closely with RJ for the past several months and want to assure you that this workshop will be extremely valuable. The title of the workshop is:

"Get Control of Your Pricing – Especially in a Down Economy"

The rest of the letter was the same as I had written. MC told me that in his early days he got one of his mentors to do an endorsed letter like this for him with great results. "It's really one of the most powerful marketing strategies ever," MC told me. "It gives an extra push by providing more credibility, which reduces the risk to the participant. Because I endorsed you, they know it will be a good use of their time."

With the letter written and sent out and the blurb placed in the BNC email, along with a few other promotional activities, such as announcing the workshop at several other BNC events and sending out a blast to my growing email list, the reservations started to come in. By a week before the event we had close to 150. "Let's overbook a little," said MC. "The only downside of a free event is you get a few more no-shows than a paid event."

"OK," I said. "Why don't we send an email to all those who've reserved a space and offer a special gift to all of those who attend. Kind of like a door prize. That should decrease the no-shows."

"Good thinking," said MC, "How about a digital copy of one of my e-books? I wrote an e-book on pricing a few years ago that would fit your topic perfectly. Would that be OK with you?"

How could I refuse? We capped the signups at 175 and hoped not more than we could handle would show up. Now, that's what I call a good problem to have!

The week before the workshop I practiced my presentation out loud and created a good set of PowerPoints. I had MC sit through a dry run. He gave me a lot of valuable pointers and helped fine tune a few of the slides. We went over the card script several times until it felt completely natural.

"I think you're good to go, RJ! I'll see you at BNC on Saturday morning."

Workshop Showtime

I didn't sleep too well on Friday night and had dreams about the presentation. I've often had dreams before an important event where things didn't go so well. In this dream the problem was about the number of people who attended. In the past I think I might have dreamed about nobody coming. But in this dream a massive crowd of 500 people showed up! Hopefully a good sign.

I arrived at 8:00 to set up the projector and make sure the room was ready. Several BNC staff members were already greeting people and MC was chatting with some of the board members in one corner of the meeting room. At a few minutes before 9:00 the room was full. A few stragglers had to stand at the back wall until the staff could find more chairs.

I started the workshop with a challenging question: "Who's tired of getting paid lower fees than you're worth?" Everyone raised their hands. "And who wants to get paid what they're really worth?" More hands and smiles.

With that, I shifted the workshop into high gear and never slowed down. I used my best material, models, examples, and case studies. I got the audience involved with exercises and role playing. The BNC members were the best audience I'd ever had and the interaction and involvement were electric. I planned to end at 11:45 to have enough time to deliver the card script. I didn't plan to do the Strategy Session script, and hadn't brought any feedback forms. But by the break in the middle of the workshop, I realized that there were some owners of mid-sized companies in the audience. It would be a lost opportunity not to offer them something in addition. So I improvised.

I wrapped up the workshop on a strong note with a commitment from the audience to start using the pricing strategies they had learned. When I offered the PowerPoint Slides and my report (I'd created a new one for this event), I got a huge show of hands. Everyone took out their cards and were ready to hand them in. Then I added my improvised script for larger business owners:

"OK, before you hand in your cards, I have something I'd like to offer to those in the audience who are *not* Independent Professionals, those who have larger businesses. Can I get a show of hands of who that is?" I got twenty hands, a little more than 10% of the audience. "For you, getting paid what you're worth isn't your only issue. Getting your company profitable and in control is even more important to you. I have some additional ideas I'd like to share with you after the workshop, so on the back of your card would you please write "INFO" and I'll also send you a report about getting control of your company.

"OK, great, now just hand in your cards to the center aisle and I'll make sure you get your reports in a few days. Thanks so much for attending and good luck in your businesses!"

Then, unexpectedly, MC came up to the podium and said, "I think you'll all agree that this was time well spent. I really urge you to follow RJ's advice on pricing. It will work for you. Now let's give RJ a big BNC round of applause."

And spontaneously the audience stood up and gave me a long, standing ovation. "I guess it really worked," I smiled to myself. I looked over at MC who, with a big smile on his face, winked at me.

In the days that followed the workshop I sent out an email to all the participants with links to the PowerPoints, report and MC's e-book. I did a special emailing to the larger business owners with my second report. And then I created a simple plan to follow up with the ones who I thought might be good potential clients. I ultimately set up Strategy Sessions with three of them, and turned two into clients before the end of the year. And several other BNC members sent me referrals and are still sending me referrals over a year later. I had more than achieved the goal of this plan.

At my next Wednesday BNC morning meeting I felt a little like a rock star. More than half of those at the meeting had attended the talk, and the facilitator for the meeting recommended that everyone who hadn't attended to ask for my PowerPoints, report, and recording. Before the end of the meeting I had 50 more cards. My e-list had increased dramatically in jus a few days.

“Does it get better than this?” I couldn’t help thinking. In my next meeting with MC, I guess I’d find out!

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Putting it All Together

"Well yes and no," MC told me. "That workshop was a huge success and you accomplished your goal. In fact, you knocked it out of the park! Everyone is talking about it and about you. You've reached a level of exposure and credibility that can take years to get with just networking. But don't let it go to your head and start thinking you're God's gift to business! That's a formula for crash and burn. The quality I appreciate most in people is true humility.

Point well taken. After all, my goal was not to be seen as some kind of superstar but as someone who could help real businesses with real challenges get real results. I knew if I kept that focus I'd be OK.

Referrals and Introductions

"So what's next?" I asked MC. "Right now I feel like I have a lot of marketing momentum, but I promise I won't rest on my laurels. I'm committed to my marketing action plans, doing follow-up religiously and taking care of my clients the best I possibly can."

"Yes," said MC, "you have enough to keep you busy for some time. These core strategies of direct outreach, networking, keep-in-touch marketing and speaking may be all you need. And as you do great work with your clients, referrals will come more regularly.

As MC had taught me, this was already happening. I didn't just wait for referrals from my clients, I asked for introductions. I was starting to ask for them near the end of every engagement when the client was expressing his thanks for the difference my program had made in his or her company. I'd gotten into the habit of developing scripts for every situation and this was one of my favorites:

> "Mr. Client, I'm really happy I could help you turn things around for your company. You have more control, your leaders are leading, your productivity and profitability are at all-time highs. I have a question for you. Who do you know that you could introduce to me to? I'm looking for clients, like you, who have great businesses like yours but also need to get them under control."

Then I explained how the client could introduce me to other company owners.

> "Please don't have them call me or have me call them. Instead, I'd like you to tell them about the kind of results we produced together and then arrange for a time we could all get together for lunch. Is there someone you have in mind?"

And I didn't end the conversation until they came up with one to three specific people who could use my services. I was actually coaching them to give me referrals. And believe it or not, they were willing to comply, often with several prospective clients.

Asking and Friendly Persistence

The big secret was just asking. The second secret was friendly persistence, both of which I had learned from MC. He once talked to me at length about these.

"Asking is simple," he said. "You don't have to have a fancy script to ask. Again, it's all about mindsets. By now I think you've realized that the biggest constrictive mindset of all is fear – fear of people. Someone can be a fearless mountain climber or skydiver; they'll risk life and limb. But challenge them to ask a client for referrals or to follow up with a prospect and they'll run in the opposite direction. Again, it's all unconscious programming. It's passed down from generations and is a real liability, not only for individuals, but for whole companies.

"I had this fear as well," said MC. "Perhaps as bad as anyone. I'd make follow-up calls very reluctantly and referrals never. One day, when my business was really struggling, I realized I had to get over this once and for all. So I called a business friend who had gotten past this fear and was now doing very well.

"'How hard can it be, MC?' said my friend. 'What's the worst that could happen? I mean really? If you ask for a referral or follow-up with a prospect are they going to call a hit-man and take a contract out on you?'"

"I guess I was ready to hear this and I just started laughing. I pictured a prospect slamming down the phone after my call and then dialing up his buddy, Vinnie. 'Make sure it's extra painful. First shoot out his kneecaps and then one right between the eyes.'" MC mimicked the appropriate gangster voice.

"Yeah, that would be the absolute worst," said MC, as he laughed some more. "That reality check from my friend woke me up. I was afraid of my imagination, my thinking, not my prospects or clients. Really, about the worse that could happen would be not getting a referral or not getting my call returned. And if I didn't ask or call, I'd be in exactly the same place. I had absolutely nothing to lose."

"What happened then?" I asked.

"I just started asking and following up. And low and behold, I survived. I was fine. And then I did it more and actually got some results. That's when I started to grasp the concept of friendly persistence. I could be persistent without being obnoxious. And I could be friendly without being a wimp. That's where I discovered my greatest strengths, in asking and friendly persistence.

This conversation with MC was a turning point for me as well. All the pieces of the puzzle started to fit together. I had worked on a lot of constrictive mindsets but had never really boiled it down to fear as my biggest barrier. And to overcome fear didn't take the courage of a warrior, but the simple attitude of friendly persistence.

Persuasion and Manipulation

Another thing that I started to realize was that I had become more persuasive, yet MC had talked very little, if at all, about persuasion. I found that in speaking to prospects, and even through emails and letters, that people didn't have a lot of resistance to what I suggested. I got to 'yes' very easily. "Why is that?" I asked MC during an earlier meeting with him. "How did I get more persuasive?"

"Persuasion is a dangerous game," laughed MC. "Yes, I've read several books on persuasion, and I understand the core, scientifically-based principles: reciprocity, scarcity, liking, authority, social proof, and commitment/consistency. These are all strategies you can use to get people to do what you want them to do. You can even use them ethically. But it's easier to use them manipulatively. A friend of mine once said jokingly, 'When you can fake sincerity, then you can get people to do anything!' But is that what you want?

"So I don't like to talk much about persuasion. It's a loaded word, like selling. Many of the marketing gurus talk about persuasion and teach these principles, but they rarely teach the ethical *practices* of persuasion. When you understand that persuasion is just a matter of having conversations and making offers for legitimate services, it removes a lot of the mystery and manipulation. So I'll leave it to you to figure out which of these persuasion principles I've taught you without talking about persuasion." And he left it at that.

That got me curious and I decided to do some sleuthing. I wrote down the six persuasion strategies he had mentioned and then did a little research. This is what I came up with. First, I found these basic persuasion definitions on Google, based on the writings of a well-respected academic.

Reciprocity – The natural tendency to reciprocate in kind when someone does something for you.

Scarcity/Urgency – Making something more valuable because there is less of it or because it will run out soon.

Liking – Just being a likeable, ethical, kind person.

Authority – Demonstrating your authority and expertise.

Social proof – Showing that others have used and benefited from your services

Commitment/Consistency – Relying on the fact that people will be consistent with the commitments they make.

And then I found examples of all of these in MC's teaching.

Reciprocity – This was demonstrated in the practice of giving away free information such as the report. MC told me that in the course of his business he'd probably given away more than 150,000 free reports. "All of that good will comes back to you eventually," he said.

Scarcity/Urgency – This was one of the underlying principles of the HEOB programs. They were high-end and outcome-based but also limited to a select group of clients. The scarcity wasn't manufactured, it was real, which increased the value even more. Urgency came from deadlines to take action, ideally ones that were real, such as a program start date.

Liking – His concept of friendly persistence worked to make people like you and respect you as well. MC had a favorite quote from David Ogilvy, the famous advertising executive: 'You can't bore people into doing business with you.' And he added, "You can't bully them into doing business with you either."

Authority – All the marketing materials, articles, etc., demonstrated my expertise without shoving it in people's faces. My monthly e-zine was a great example of that as it demonstrated I was an authority without having to say it. And of course my workshop had accomplished that as well. I was now seen as an authority in the area of asking and getting higher fees.

Social proof – The use of stories and case studies was a keystone to his teaching and he encouraged their use in conversations and in marketing materials. He once described cases studies as 'latent marketing energy.' "You have all those great stories from successful clients. But they're useless unless you get people to read them. One great case study on your website can be a tipping point that gets a client to call you, ready to go to second base."

Commitment/Consistency – A great example of this is how he got participants to raise their hands at a talk if they wanted the report. He told me, "When you do that, almost everyone hands in their card. But if you don't get a show of hands very few give their cards. People make a commitment with the show of hands and then will tend to act consistently with that." And then I validated that in my workshop.

As I reviewed everything I had learned from MC, I realized that persuasive techniques permeated his work. But the way he taught them never felt manipulative. "After all," he said, "I'm not hurting anyone if I get more reports out to more people. If the material is good, it's my moral obligation to spread the word around. All of these persuasive principles are common sense. But I like to teach practices immediately after teaching principles; then they stick a lot better."

Perhaps this is the biggest lesson I learned from MC. I started to model his teaching and coaching techniques with my clients. Along with proven principles, I taught practices. I made them practical, not theoretical. I didn't explain what it meant to get control of a company, I showed my clients how to take control. I didn't expound much on the theories of measurement, I got them measuring their most important statistics. And I made sure my clients didn't get lost in the myriad of ideas on leadership. Instead, I got them to lead.

Latent Marketing Energy

Another powerful concept MC taught me near the end of our coaching relationship had to do with marketing energy. "To implement any marketing activity you need energy. And I don't mean physical energy, I mean marketing energy. There are several different kinds of marketing energy. Marketing energy starts with knowledge and skills. A person with more marketing knowledge and skills has more marketing energy than someone with less. You can create and implement better strategies and get superior results in a shorter amount of time. A specific type of skill is the ability to communicate powerfully. Communication is at the center of all marketing. So if you understand Marketing Syntax and how to deliver a message powerfully, this marketing energy will take you further with less effort.

"In my opinion, no marketing energy is more powerful than your relationships. If you have a lot of satisfied clients, meet a lot of people through networking, have a large e-list, even followers on social networking, you have tremendous marketing energy because you can re-connect with those people over time and generate very significant marketing results.

"But what few people understand is that most of this marketing energy is completely latent. It's untapped energy. You have knowledge and skills, communication ability and a network of relationships. But if you don't utilize this energy, it goes to waste. As you grow your knowledge and skills and relationships you are storing up this marketing energy. Then you can apply some of this energy though very focused marketing action plans. For instance, you put all your knowledge, skills and relationships to work for you in the presentation at BNC and produced an extraordinary result that is still bringing you new prospects and clients.

"I suggest you do a inventory of your latent marketing energy and you'll start to see what I mean. You'll see that it's virtually untapped, ready to be unleashed when you're ready."

When I made my list, I was surprised. I had stored up more marketing energy than I had realized.

Knowledge and Skills – in the following areas:

Creating and delivering attention-getting marketing messages, developing persuasive marketing currency, engaging people in marketing conversations, setting up and conducting successful strategy sessions, leveraging networking connections, doing keep-in-touch marketing, speaking and delivering teleclasses and webinars, and a whole lot of other skills too numerous to mention.

Relationships – in the following areas:

About 30 past and current clients, over 250 people through BNC, about 2500 people on my e-list, close to 3,000 connections through various social networks. And I also included stories and case studies from my most successful projects.

I showed this list to MC and he said, “Don’t forget all your qualities. Those are marketing energy as well. I’d add creativity, resourcefulness, determination, patience, curiosity and a liking for people. When you launch a marketing strategy, you put all of those into play as well. So what does all of this tell you?”

“It tells me I’d better get cracking to put all this marketing energy to good use! I’m already thinking of new marketing strategies I could implement tapping into the marketing energy I’ve already accumulated. For instance, I think it’s time to develop a product or program that can be offered to all the people on my e-list, perhaps a video series on ‘Getting Control of Your Business.’”

“Good idea, RJ. That’s a great way to channel your marketing energy.”

Marketing as a Game

Finally, perhaps nothing I learned from MC was more important than his concept of marketing as a game, with a purpose, rules and structure. “The thing about a game,” said MC, “is that it’s fun to play. And I don’t mean frivolous fun. A game is only fun if you can both win and lose, when something is at stake. Before you learned Marketing Ball, you were mostly losing at the game of marketing. When you mastered the rules and skills you had the opportunity to win, but it still took dedication, focus and hard work to do so.

"An exciting game is one where you can continually up the ante. You can play Marketing Ball and attract some very good clients. And then you can learn how to play it more skillfully and attract even better clients – not just bigger, higher-paying clients, but clients that you love to work with and where the results you produce for them are personally fulfilling. It doesn't get any better than that."

Next Steps

I continued to work with MC for a year as we had agreed. Our meetings in the final six months were quite different than the first six months. He started by training and tutoring me and ended by coaching me in the truest sense of the word. Sometimes I felt he knew more about what was happening in my business than I did.

He kept asking me where I was in Marketing Ball with a particular prospect. "What's the next step you're going to take to move her to the next base? What's your plan, what's your strategy, what's your script? What marketing energy can you apply?"

He certainly didn't let me get away with much. On the other hand, many of our conversations were entertaining and provoked much laughter. He always had one more story about another of his clients and how they solved a complex marketing challenge. But his own stories were the most revealing. The ones about how he overcame the struggles in the early years of his business were the most instructive. "Did I tell you how I lost my credit for seven years?" or "…the time I got my proposal back in the mail telling me what a worthless piece of trash it was."

He'd often laugh uproariously at all the dumb mistakes he'd made.

When the year was over, I expected him to ask me to sign me up for another year, but he did just the opposite. "I hate building client dependency, RJ, and I have a long list of people who want to work with me. You got what you came for, plus some. Anytime you want to talk or have a question, the door is open.

And I'm even willing to do a joint venture project with you if you have an idea for one. Perhaps another killer workshop!"

"I'll also bump into you occasionally at BNC, which reminds me of something." He reached into a desk drawer and pulled out a small envelope and handed it to me. I opened it and pulled out a card that read:

You are cordially invited to the annual
BNC Awards Banquet.

Please come and celebrate the successes
of all our BNC members,
including yourself.

"It's next Thursday evening," said MC. "I'll see you there!"

Epilogue

The BNC Awards Banquet was their most attended event of the year. Everyone was dressed to the nines. I was at one of two tables MC had sponsored along with 19 of his current and past clients. I was surprised to see that my name card was next to MC's in the 'place of honor.' I wondered what that was about.

MC welcomed me warmly and introduced me to all of his clients, many of whom I had already met in the course of the past year. In fact, they were the members in BNC who had been most helpful to me, introducing me to potential clients, sharing networking tips with me and relating some of their own stories of working with MC.

After dinner, the awards ceremony began. BNC certainly understood the power of acknowledgement! There were awards for every possible category, Biggest Business Growth of the Year, Friendliest Networker, Most Leads Shared, Biggest Client Landed, and of course, Networker of Year, that went to one of MC's past clients. The spirit of enthusiasm and fun rivaled the Academy Awards.

It looks like there was one more award. And the person presenting it was MC.

"I'm very proud to present the final award of the evening. As a founding member of BNC, I get to hand out a very personal award once in awhile to a member of BNC who is also one of my clients. The person receiving this award has excelled not only in networking but in every area of marketing his business. He's gone beyond the extra mile to implement marketing strategies that have attracted clients whose businesses he is impacting profoundly. He has succeeded not only in the externals of marketing but in the game of mastering his marketing mindset. Nothing seems to stop him, and I believe he has an extraordinarily bright future.

"Please stand up to accept your award, for Marketing Ball Rookie of the Year… RJ!" He called me up to the podium and handed me a small wooden hand-carved trophy. When I looked at it closely, it was a baseball topped by a bat.

For once, I was completely speechless.

About the Author

Robert Middleton, the Marketing Coach, as been working with Independent Professionals to help them attract their ideal clients since 1984. Robert is a marketing consultant, coach, trainer, writer and designer. He is the author of the InfoGuru Marketing Manual and the WebSite Toolkit. He's been publishing the More Clients email newsletter (e-zine) since 1997.

His business, Action Plan Marketing, delivers programs that include the Marketing Club, the Marketing Mastery Program and the Marketing Ball ScoreKeeper software. Robert lives with his wife, Saroj, in the Santa Cruz Mountains of California in a redwood forest with a river in his backyard.

Robert's concept of Marketing Ball was developed in 2002 and has been employed in workshops, teleclasses, group programs and individual consultations. It has been applied and proven to make the marketing process easier and more effective for thousands of Independent Professionals. This book was in the "concept stage" for eight years and then written in 18 days over the Christmas Holidays in Mazatlan, Mexico.

Marketing Ball Forms & Worksheets

Below you'll find all the diagrams, forms worksheets and samples mentioned in the book. Just click on the link to download them. Most are Word.doc files and will download and open on any computer.

Marketing Activity	**Link to Form or Worksheet**
Marketing Ball Diagram	www.actionplan.com/mbb/01.doc
Marketing Message Worksheet	www.actionplan.com/mbb/02.doc
HEOB Instructions and Samples	www.actionplan.com/mbb/03.doc
Report Instructions and Samples	www.actionplan.com/mbb/04.doc
Strategy Session Outline	www.actionplan.com/mbb/05.doc
Proposal Process and Samples	www.actionplan.com/mbb/06.doc
Project and Time Management Forms	www.actionplan.com/mbb/07.doc
Getting Unstuck Worksheet	www.actionplan.com/mbb/08.doc
Marketing Action Plan Form	www.actionplan.com/mbb/09.doc
Speaking Tracking Form	www.actionplan.com/mbb/10.doc
Speaking Feedback Sheet	www.actionplan.com/mbb/11.doc
Ten 10 Biggest Marketing Mistakes	www.actionplan.com/mbb/12.doc
Technology Guide	www.actionplan.com/mbb/13.doc

Notes

Below are notes from each of the chapters, citing sources and origins of some of the material in the book along with some resources.

Prologue – RJ is a composite character based on several clients I've worked with over the years, including me in my early years. And MC is me, more or less. I try not to flatter myself too much.

1. The Game of Marketing – This was developed exactly as recounted by MC. Marketing Ball came into being in 2002 and has been used by thousands of Independent Professionals. It's now also a computer program and app that lets you track prospects around the Marketing Ball.

2. Marketing Messages – Many years ago I coined the name "Audio Logo" as at attention-getting message. The CMM is similar to a USP or a host of other initials marketers have used to label a marketing message. The label is not the point. The clarity and benefit of the message is.

3. Marketing Currency – I like to think of any written marketing materials as currency because they buy the attention, interest, involvement of a prospect. The HEOB concept was originally inspired by Alan Weiss, the Million Dollar Consultant.

4. Marketing Reports – I've been using reports and articles for years to get visitors to my website to give me their name and email as well as using it as an all-purpose icebreaker or giveaway that leads to the next marketing step.

5. An Outreach Experiment – This is an exercise I give to all my clients early in my work with them. It often does result in new clients fairly quickly. Follow-up is key to making this, and many other marketing strategies, work.

6. 7. 8. 9. – Strategy Sessions – This selling process is the most effective I've ever used. It's a very deep conversation and is non-manipulative. I learned a version of this through one of my business coaches, Christian Mickelsen. He calls it: 'Free Sessions that Sell.' It will work for selling services to individuals as well as businesses large and small. Jut make sure you customize the scripting for your situation.

10. Strategy Sessions in Action – I wanted to give my readers a sense of what can happen if you conduct Strategy Sessions successfully. These scenarios are fictionalized yet are very close to Strategy Sessions conducted by dozens of my clients.

11. Websites and Mindsets – As people get more into writing, especially their website, it's not unusual to hit all kinds of barriers and resistance to getting it done. I include the WebSite ToolKit in the Marketing Club.

12. Two Days of Results – This chapter gives a composite picture of all the things that can happen when your marketing is focused and on track. Days like this are not a fantasy. I've had many of them!

13. Staying on Top of It All – You may think it's unusual to include organization and time management in a book about marketing, but it really helps to hold everything together. I've been using this system for years with great success. I've liberally borrowed ideas from everyone.

14. Marketing Mindsets – The most important concept I teach does not come from me or have anything to do with marketing directly. What I'm teaching with the four questions and turnaround is The Work of Byron Katie. I've studied with Katie personally through her courses and school. Katie tends to focus her work more on relationship issues; I focus more on getting unstuck. This work is profound. Don't skip over this. Do the work! I highly recommend all of Katie's books, especially 'Loving What Is.'

15. Marketing Strategies – This is where the rubber meets the road and all the preparation turns into action. Marketing strategies are simple, especially if you are playing Marketing Ball and breaking them down into small, doable steps. Make sure to download the Marketing Action Plan worksheet.

16. Networking, Social Media & List Building – I cut my teeth on networking and list-building in the mid 80's to early 90's in San Francisco. I belonged to groups and started groups that connected me with a lot of people, which helped to build my list, my clientele and my reputation. BNC is a composite of various networking groups I've belonged to. It is close to one in LA that a client has been so successful with a client as recounted in this chapter. You can find these types of groups by searching on Google under "business club cityname" or go to www.clubcorp.com for a network of over 200 clubs nationally. There are clubs like this in most metropolitan areas.

17. Keep-in-Touch Marketing – My marketing secret weapon. I've generated more business from my e-list than anything else. But it's unusual for someone to write a weekly e-zine every week for over 15 years. I still write it weekly. Make sure to subscribe! For an e-list manager, I recommend www.AWeber.com.

18. Speaking, Teleclasses and Webinars – Killer marketing strategies for sure. I love speaking to groups large and small and it's a great way to attract qualified clients. Nothing can really replace this strategy. The story of 26 clients in 26 weeks is exactly what I did. To find a virtual assistant that can help you book talks, search in Google under "virtual assistant cityname" or search for "virtual assistant association."

19. Playing Marketing Ball – This whole chapter represents a number of presentations I've given to professional groups over the years. You really can get results like this if you have the right plan. The endorsed letter is something I've done for several clients with excellent results.

20. Putting it All Together – This chapter gathers a number of other key marketing principles and practices I've taught my clients, including the laws of persuasion, asking, friendly persistence, and latent marketing energy.

Epilogue – A pure fantasy, but a pleasant and possible one!

Marketing Ball Glossary

These are the special terms used in Marketing Ball. They are primarily the steps in the Marketing Ball Process.

Marketing Ball – The marketing model or game based on baseball. When one is playing Marketing Ball, one is moving prospects around the bases using various marketing strategies and tactics.

Independent Professional – This includes a wide variety of self-employed professionals such as management consultant, executive coaches, corporate trainers, financial, legal and employment professionals.

Locker Room – This where one prepares to play Marketing Ball by developing a Marketing Message, Marketing Currency and a Marketing Plan.

Marketing Ball Game – The complete interaction and relationship with one prospect as you take them around the bases.

Home – This is where Marketing Ball starts. When you are at home you are ready to communicate your marketing message to your prospective clients through one or more marketing strategies.

Stranger – This is a prospect you do not know and they do not know you.

Affiliation – This is a prospect you have some connection with such as being a member of the same organization or the associate of an existing client.

Attention – What happens when you use a marketing message with prospect and they want to know more.

Offer – Something you give to a prospect once you have their attention, such as a report or other information

First Base – Where you are once you have the attention and interest of a prospect.

Information – What you give to prospects to educate them more about your business. Could include any kind of marketing currency such as a report, video, etc.

Familiarity – When you have started to develop some degree of the know-like-trust factor with a prospect.

Experience – A more complete sense of what you and your business provides to your clients often through some kind of presentation.

Follow Up – What you do to move someone heading towards second base, closer to second base. Also moving those on third base to home.

Second Base – A meeting with a qualified prospect who is ready to explore working with you.

Strategy Session – The selling process you engage in once you're on second base.

Setting the Stage – The first part of the Strategy Session where you set the direction for the session.

The Interview – The second part of the Strategy Session where you explore the prospect's situation, goals and challenges.

The Presentation – The third part of a Strategy Session where you outline and explain the outcomes, features and structure of your services.

The Close – The final part of the Strategy Session where you ask the prospect if they'd like to work with you.

Third Base – Where the prospect has declared they want to work with you.

Confirmation – Where you have confirmed the prospect's commitment to work with you.

Proposal – A document that outlines exactly what you will do for your client if they hire you.

Price Commitment – A final commitment to working with you, culminating in payment for your services.

Home – This is also were a game of marketing ball ends once you've scored a new client.

Dugout – This symbolizes working with a new client once you've brought them successfully around the bases.

Referrals – Introductions to qualified prospects from happy clients and also referral sources such as business associates.

Marketing Action Plan – A step-by-step plan for implementing a marketing strategy.

Marketing Mindset – A collection of thoughts and beliefs held by the marketer, which either impedes the progress or supports the progress of the marketer towards their goal.

Super-Effort – A sustained effort towards a marketing goal that is outside your comfort zone.

Beyond the Extra Mile – An extremely high level of service provided to your clients.

To play and win at the game of marketing, the marketer must understand what each of these concepts in the Marketing Ball game mean and develop the skills to implement them successfully.

Book List

There have been thousands of books written about marketing. The following is a list of book I've found particularly influential.

Million Dollar Consulting – Alan Weiss

Every Independent Professional needs this book. It will open your eyes to the concept of value-pricing and selling solutions, not your time.

Getting Everything You Have Out of All You've Got – Jay Abraham

Jay had a huge influence on my marketing. In this book he outlines his primary principles for marketing success. Brilliant stuff.

Made To Stick – Chip and Dan Heath

An excellent little book on developing effective marketing messages.

Influence – The Power of Persuasion – Robert Cialdini

This book is based on scientific experiments on how persuasion actually works. Cialdini emerges with 6 ethical persuasion principles that can be applied to almost any kind of marketing: reciprocity, scarcity, liking, authority, social proof, and commitment/consistency.

Change or Die – Alan Deutschman

This is a very exciting book for any Independent Professional who wants to help his clients change. He outlines a very persuasive, but simple change model.

Loving What Is – Byron Katie

Katie says the only cause of suffering is an unquestioned thought. I've found that to be true in life and in marketing. Question all those thoughts and you're left with yourself and what's in front of you.

Resources

Below are various resources available from Action Plan Marketing.

The Action Plan Marketing Website – http://actionplan.com

Go here to get a copy of our most current report and to add your name to the weekly More Clients e-zine.

The More Clients Blog – http://actionplan.com/blog

Go here to read past issues of the More Clients e-zine and other blog posts.

The Marketing Club – http://actionplan.com/fasttrack

This is our monthly membership site with online courses and programs, expert interviews, and Coaching Calls.

The Website ToolKit

This tutorial for developing a website is included in the Marketing Club

The Marketing Ball ScoreKeeper

This prospect tracking software is included in the Marketing Club

The Marketing Mastery Program – http://actionplan.com/mastery

This is our one-year program where we work with 20 participants and help them get to the next level of marketing mastery. You are welcome to apply.

Contact email address and phone number can be found on the website.