Get More Meetings Land More Clients

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The proactive way to grow your professional service business with personalized meetings and conversations

By Robert Middleton

If you're a self-employed B-to-B professional, one thing is certain: You need to attract a steady stream of new clients.

There are a whole lot of ways to do this, but no matter what marketing strategies you use, did you ever notice that before you landed a new client you had a meeting with them?

Meetings lead to new clients. And if you get more meetings, you'll land more clients. In fact, I say that ***the main purpose of marketing your professional services*** is to get more meetings with prospective clients.

So, the most important question you can ask about marketing is, *"What exactly do I need to do to get more meetings and conversations with qualified prospective clients?"* If you know how to do that consistently, you'll attract all the clients you need.

And that's what this report is about: All the ways you can get more meetings that lead to new clients.

Marketing Yourself Proactively

The first thing to remember is that you need to take the initiative in getting meetings with prospective clients. If you wait for someone to ask you for a meeting, you may wait for a very long time!

No, you need to approach others. You need to reach out to get

conversations and meetings. My most successful clients have embraced the practice of asking for meetings because they know this is the key to turning prospective clients into paying clients.

The Purpose of Prospect Meetings and Conversations

An initial conversation or meeting with a prospective client should accomplish one or more of the following:

1. **Initiate or renew a Relationship with the prospective client.** If someone has never spoken to you before, you clearly don't have a relationship with them. But if you know them, start by catching up with them about your respective businesses.
2. **Qualify the prospective client,** to learn if they need and want the Ultimate Outcome you deliver though your professional services.
3. **Offer to give a Presentation about your services.** Give those you speak with an opportunity to learn about your work and how it can help them achieve their business goals.
4. **Set up a Strategy Session.** This is an in-depth conversation to explore if your service or program is a fit for your prospective client.

In, fact, it's important to remember that you don't want to pitch or sell in any way in your initial outreach. *"Hey, I just wanted to talk and see if you might be interested in hiring me as a coach. It's such a valuable thing."* Yes, it might be, but that's such an obnoxious approach.

No, it's more like, *"Hey, I'd like to know more about you and your business. Why don't we find a time to meet?"*

The Meeting and Conversation Mindset

Before we get into all the nuts and bolts of getting more meetings and conversations, it's important to look at the mindsets that may be getting in the way of reaching out and asking for a meeting. And, guess

what? This may be **Most Important Part** of this report. So, don't skip it!

For many, asking for a meeting or conversation comes with one or more of these mindsets: "They'll think I'm pushy. I don't want to bother or interrupt them. They won't be interested anyway. I'm not sure they'll find my services valuable. The timing isn't good. I'm just not good at explaining what I do. Nobody likes me, everybody hates me!" 😢

If you don't have any of those mindsets, you'll have no resistance to reaching out and connecting. So, first of all, you need to realize that all of these fears, without exception, are nonsense. You adopted these mindsets to protect you from possible rejection. If you don't reach out, you can't be rejected. Rejection is painful, so your mind will come up with all kinds of crazy stuff to keep you safe.

Look, I've worked with a lot of clients over the years. And none of them have died from rejection! About the worst that can happen if you reach out is that you get no response. And mostly that's just because people are crazy busy.

It can take several attempts to connect with a prospect before anything happens. As long as you approach a prospect with professionalism, intelligence, and courtesy, you have nothing to worry about. And if someone doesn't respond to your email or call, you can always follow up again in a few days.

You want to be persistent, determined, and unconcerned about rejection or not getting a response on the first attempt. What's the big deal? You can try again. You know you have a lot of value to offer. You know your services make a difference. You know you're a decent, smart, civilized human being worth knowing.

But here's something you may not know: People actually love to be invited. When you invite someone to have a conversation with you, it's a

bit of an adventure; it's a fun thing that may open up new possibilities.

So, how do you approach this? Playfully!

This is the key, the secret, the thing everybody knows deep down but can't see because they're so caught up in the seriousness of it all. Look, when you're really into something, you're having having fun. You're being playful. And that makes it easy.

So when you're reaching out to prospective clients to get meetings and have conversations, you want to be playful with the process. Be light, not heavy. Be informal, not buttoned down. Be yourself, not some version of yourself that you think others will accept.

After all, it's not a big ask. You're not asking to borrow a million dollars; you're inviting someone to meet with you and have a conversation.

You might call this the "sane perspective." All that angst about being accepted and desperately hoping you can land this new client because, "My work is so terribly important and significant if only they understood and appreciated my immense value," is not a sane perspective.

When you embrace the sane perspective you realize that it simply takes conversations and meeting to ultimately turn prospects into clients. So you choose to make it fun and enjoyable and playful. **Goodbye significance** — hello friendly and valuable conversations.

Of course, every conversation is somewhat different, depending on the situation, the relationship you have with the prospect, how familiar they are with your services, etc. I also like to think of these initial conversations as "introductory or get-acquainted meetings."

Once you learn how to get in front of more qualified prospects who are ready to explore how you can help them, then the big mystery of marketing and landing clients is solved once and for all.

By the way, this process works pretty much the same whether you're offering your services to another self-employed professional, a small or medium-sized company, or a multinational corporation.

Nine Different Categories of Prospects and How to Get Meetings with Them

We start with all the different categories of prospects you can reach out to and best way to make that connection.

1. Past Clients – People you've worked with before who are potentials for more work or who can be referral sources.

2. Networking Connections – People you know through business from many different sources. They are possibly potential clients or referral sources.

3. People on Your Email List – You may not have met them, but most are familiar with you as they've been reading your material for some time.

4. Referrals – Those who have been referred to you by a client or networking contact. (Don't wait for them to reach out to you!)

5. Referral Sources – Those who are in a related business who can refer their clients to you as a resource for a service they don't offer.

6. Organization Contacts – Those in organizations your belong to: I.e. Chambers of Commerce or Professional Associations.

7. University Alumni – Anyone you went to university with or even those who attended the same university. Don't underestimate the power of these connections!

8. LinkedIn Contacts – Those you are already connected to on LinkedIn (you may or may not know them yet).

9. Attendees of a Talk, Presentation or Webinar – This may be a presentation you host yourself or one you give through a sponsor.

1. With Past Clients

Past clients are your "low hanging fruit," those whom you've worked with before and who already know, like, and trust you. You did a project for them a while ago or did a piece of work that lasted a few months. But perhaps you've been out of touch for a while.

Nevertheless, you have a hunch that there are other ways you could help this client. Maybe you have another service they are not familiar with. Or perhaps you've created a new program since you worked with them last. So, they are great candidates for additional work.

But you can't just call them up out of the blue and say, *"Hey, do you have any new work for me?"* No, you need a smarter, more proactive approach. You need an approach that is smart and engaging.

What I usually suggest is sending an email that gets you back on their radar and asks for a time to meet (for a pre-selling conversation).

Here's an actual email a client recently sent to one of her past clients (followed by the client's response):

Hello David,

It looks like Jonesboro Staffing continues to grow—the website tells the story! You and Allan must be very proud.

It has been a while since we've spoken. I'd like to touch base by phone, get caught up on the business and the management team, share what's driving growth for my clients, and update you on two unique service offerings I've launched:

One is a "Breaking IN!" 10-step sales touch plan that's bringing in job orders and big revenue for my clients, and the other I think you're aware of, a

coaching plan that gets successors ready for bigger jobs — I've added two more options for this program.

Please let me know your availability in the next few weeks and I'll set up a 30-minute call.

Regards, Amy

And here's John's response that came about an hour after Amy sent her email:

Hi Amy:

It's good to hear from you! Yes, our company has certainly grown and continues to do so. In fact, we're looking for other acquisition opportunities, whether it be commercial, IT or healthcare staffing.

I'll be happy to schedule a call, to learn more about what you have to offer. Currently, I'm available the morning of Monday, the 18th or anytime on the 25th and 26th. Let me know if any of these dates work for you.
— John Jonesboro

Now, I don't promise you'll get such a quick or enthusiastic response, but it's not unusual.

Amy did a few simple things in her email. First, she praised the success of the company. Everyone loves that, of course. Then she talked about the two new programs she was offering, with a very clear and powerful outcome for the first one — "bringing in job orders and big revenue for my clients." Yes, that's an outcome almost any business owner would be interested in and want to know more about.

Remember, if you're in business, people hire you not for your winning personality and the wonderful consulting, coaching, and training you deliver, but for the desirable outcomes you help them realize.

This worked so well because the client already knows, likes, and trusts

Amy and is very open to new results she can help them achieve.

Action Step: Start making a list of every single past client you've ever worked with and draft a simple email like Amy's (which will be personalized and a little different for each person) and start sending them out. And remember the sane perspective. Don't make it hard.

2. Through Your Network and Connections

The people you already know are your gateway to new clients. And what you need to do is meet with more of your connections. What I recommend is a process called "Fifty 20-Minute Meetings."

You start out by sending an email something like this:

Hi John,

I was just thinking about you. It's been a while since we've been in touch. I notice you are up to X these days (info you got from LinkedIn, Facebook or their website).

I'd love to catch up and learn more of what you're up to and share some new ideas regarding X Ultimate Outcome I've been working on.

We can meet by phone, by Zoom video. Let me know what would work best for you. Looking forward to meeting.

You can also set up a 30-minute meeting on my calendar: http://bookme.com

Looking forward to speaking!

Cheers, Robert

Remember, you're sending this out to people you already know. If you don't get a response, then you can follow-up by phone.

Your goal is to set up short, 20-minute meetings with everyone and

anyone in your network. Of course, start with those who are the best connected such as business associates, past co-workers, etc.

Action Step: Make a list of everyone in your network, then prioritize those who you think would be most valuable to meet with. Set a goal to meet with 50 people over the next five or more months. Send out those simple emails and set up your meetings. Then you can add people in the following categories to your outreach list.

3. People on Your Email List

If you have an email list, even a relatively small one, these are your followers and fans. They know you better than you know them. But chances are, you haven't spoken to all of them.

You can reach out to them individually to get a meeting. If you have an email list manager, such as AWeber or Mail Chimp, you can go through your list and note when they first become a subscriber. This is what you can say in your email.

Hi Jane,

I notice you've been on my email list for 7 years. That's a long time! I'm setting up short meetings with some of my most loyal subscribers to learn more about their businesses and their marketing challenges as well as share some ideas about attracting more ideal, high-end clients.

Are you open to a quick, 15 or 20 minute meeting?

If so, you can set up a time on my calendar: http://bookme.com

I look forward to speaking with you!

Cheers, Robert

4. Referrals

This is anyone who's been referred to you by a client or networking contact. Ideally, the referral source will have told the referral about you and asked if it was OK, to contact them. This is the email you might send:

Dear Bill,

I was speaking with our mutual contact, Brenda Jones, yesterday and understand she spoke to you about how I help businesses like yours improve their cash flow.

Brenda was a great client that we had a lot of success with.

I'd be more than happy to set up a get-acquainted meeting via phone or Zoom. Do you have any spaces open next week?

I look forward to meeting with you.

Cheers, Robert

5. Referral Sources

Some businesses have natural referral sources. For instance, bankers often refer to financial consultants. Business brokers get referred by accountants, etc.

This is one of those categories of businesses where you can ask people in your current network if they know a good banker, accountant etc. And then ask for an introduction. You then might send an email something like this:

Dear Richard,

Our mutual business associate, Frank Foster, suggested I reach out to you. As you may know, I'm a business consultant who works to help small businesses (under $10M) prepare for the sale of their business.

Over the past 20 years I've worked successfully with 39 companies to increase their company's value and ultimately sell them at a net profit.

I partner with bankers, accountants, business brokers, and others who have long-standing, relationships with these types of companies.

I'd like the chance to meet with you and show you some of the work we've done.

I have a number of openings next week. Please let me know if that would work for you.

Cheers, Robert

6. Through Professional Organizations

You may belong to a chamber of commerce, a professional association, or a service club. Thing is, despite this connection, you don't necessarily know fellow members that well and/or they don't know you. So, invite them to meet with you with an email like this.

Dear Jason,

I don't think we've met, but I'm also a member of the Santa Cruz Chamber of Commerce.

I have a goal to get to know as many chamber members as possible and explore how we might be able to help each other's businesses.

I noticed that you're an executive coach. I'm a marketing coach for service professionals and have been in business for 35 years.

Could we set up a quick 15-20 min phone or zoom call sometime in the next week or so? Let me know, or feel free to set up a time on my calendar: http://bookme.com

Cheers, Robert

By the way, I used exactly this approach more than 30 years ago to

get meeting with the members of my local chamber of commerce. I actually sent a letter and then followed up by phone. Everyone took my call and most of them met with me. Several became paying clients. They key was mentioning my connection with the chamber. That affiliation opened a lot of doors for me, even though I had not met any of them before.

7. Through Your University Alumni

We often don't realize how powerful university connections can be. Say you attended Columbia University but now live in the SF Bay area. Are there any Columbia grads in your area?

Well, I just did a LinkedIn search and found 34 Columbia U. Grads who are management consultants in the SF Bay Area – in less than a minute.

Here's an email or LI message you might send:

Dear Susan,

Just noticed on LinkedIn that you're also a Columbia Grad living in the Bay area. I'm class of '79 with a major in marketing.

I'm connecting with other Bay Area Columbia grads for purposes of networking and growing our respective consulting practices.

Would you like to meet for a quick phone or Zoom chat? Please let me know.

Cheers, Robert

Again, don't underestimate the power of affiliation. Any connection you have, even a membership in an organization or a university can make all the difference in the world. If you have some kind of affiliation, you are no longer a stranger.

8. Through LinkedIn

LinkedIn is the most powerful tool for connecting with business people you don't know. However, most people don't leverage the LinkedIn connections they already have.

I suggest you prioritize getting meetings with people who are already connections (these people may or may not be on your list of network connections).

You can do a few things. One is to make comments on posts in your newsfeed. Of course, say something that adds value to the conversation, from your personal experience.

Another is to simply reach out via LinkedIn and request a meeting.

Hi Janet, I notice we've been connected on LinkedIn for 4 years but have never spoken. I see that you're a management consultant in the medical field. Would love to know more about what you do and how you serve your clients. Would you be open to a quick 15-20 minute Zoom meeting? Cheers, Robert

Action Step: Become active on LinkedIn. Tune up your profile and ideally, get LinkedIn Sales Navigator so you can zero in on your ideal clients. Then start reaching out as I've outlined above. Start slow and then build momentum by connecting to a few people a week.

9. Attendees of a Talk, Presentation, or Webinar

For years, giving talks was my primary marketing activity. I'd give talks about some aspect of marketing and then, after the talk, I'd collect business cards if they wanted to be on my email list.

How successful was this? Well, when I moved my business from San Francisco to Silicon Valley in 1994, I launched a speaking campaign and spoke to nine or ten groups over six months. And in that time, I attracted 26 new clients, or about one new client a week.

But remember, they didn't turn into clients just because they attended a talk. That's never enough. No, I got those clients by following up with everyone who gave me a card and set up phone meetings with a whole lot of them. Many of those initial conversations led to selling conversations and ultimately, new closed business.

I gave a talk at the International Coach Federation a few years ago. There were about 300 attendees. At the end, I collected about 250 business cards and (with their permission), added them to my email list and subsequently promoted my newest program. I set up meeting with those who showed interest and ultimately generated $70K in new business from those who attended my talk. So, yes, talks work.

I now promote my main programs via webinar to those on my email list. After the webinar, I invite people to talk with me and see if the program might be for them. I then convert from 50% to 75% into participants in my program.

Here's a sample email I might send to someone who attended one of my presentations (live or virtual). I send them an email a day or two after the presentation.

Hi John, how are you? Thanks so much for attending my presentation on Friday. I hope you got some good ideas.

I'm reaching out to everyone who attended to offer a brief meeting to learn more about your business and your marketing, and also to explore if I can help you attract more of your ideal, high-end clients.

Do you have a few minutes late this week to talk on Zoom? Please let me know. Here's my appointment link: http://bookme.com

Cheers, Robert

Action Step: Develop a talk, research places to give it, and reach out to get booked (yes, this takes some time, but it sure is worth it)! When you

give a talk, collect cards at the end (offer a freebie in exchange for their cards). And then follow up with those people. Look, those who attended your talk have an experience of you; they are very qualified prospects.

What to Say in Your Brief Meetings

What you say in your initial brief meeting depends on what the source of the contact is. And it also depends on your relationship with the prospect.

But the important thing to remember is that this meeting is not a sales meeting. You are not selling anything yet because you don't know their situation or needs.

I like to think of these meetings as introductory or get-acquainted meetings. And I want to discover if this person may be a good potential client for me. So, it might go something like this:

Hi, Jerry, thanks for taking a few minutes to speak with me. (Then mention the context of your connection – from past client, networking, LI contact, to someone who attended your talk, etc.)

(Next talk about them, not you. You might ask a few questions)

Jerry, I understand you do consulting in leadership development. How long have you been in that field? Who are the clients you work with the most? What's the current focus of your business? And what are some of the biggest challenges you're facing? Is attracting more of your ideal clients a priority for you? How do you market your services right now?

Then, tell a little bit about your focus and goals.

Right now, my main focus is helping self-employed professionals attract more of their ideal, high-end clients. I'm looking for people such as management consultants, executive coaches and corporate trainers.

Something I realized is that those in my network, although they know about

my work, don't know exactly how I work.

I've put together some ideas that explain my work in more depth. Is this something you might be open to looking at? It will take about 20 minutes. We could do it now or set up another time.

So, here's the punchline of this report. The first job is to get meetings and have conversations with those who might be prospective clients or who can lead you to prospective clients.

The next job is to educate them through a simple, clear, and concise presentation about your work. This is usually done through a specially designed PowerPoint presentation.

You shouldn't think of this PowerPoint as a pitch, but as information and education about your services. Remember, that if people don't really understand what you do, they are unlikely to hire you or refer you to anyone else.

Going into details about how to create such a presentation is beyond this report, but we'll be covering this in depth in another FMMM session.

Your Marketing Action Plan

OK, that's it. This is your guide to getting more meetings that lead to more clients. Marketing starts with getting out there and being visible. But then you need to reach out to the people you meet to get conversations and meetings. And be playful about it!

This approach is very low-key in many ways, but it's also very focused and intentional. I recommend setting goals for getting new conversations with prospective clients. And also, get engaged in two or three of these marketing activities. For instance, some reaching out to get meetings with your network, some speaking, and some LinkedIn activity will start to give you real momentum. If most of your business

comes from referral sources, then focus on meeting with those people.

And the more conversations you have, the better you'll get at it. Before you know it, anytime you connect with someone, you'll have a sixth sense about what questions to ask and what to do next. You'll engage more successfully and get more meetings.

About Robert Middleton and Action Plan Marketing

I've been working with self-employed professionals since 1984 though coaching, consulting and training programs. I currently offer my nine-month More Clients Group Program where we work together intensively to help you get more meetings and land more of your ideal clients.

Since you're reading this, you're now on my Fearless Marketer email list, so stay tuned to any announcements about upcoming programs.

You can reach me directly at action@actionplan.com

Cheers, Robert Middleton

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